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Exploring Organizational Values of the Organizations and Employee-Owners in Worker-Owned Cooperatives

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This is to certify that the doctoral dissertation by

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Abstract

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by

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MBA, University of Phoenix, 2010

BS, Eastern Michigan University, 2006

Dissertation Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Philosophy

Management

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Abstract

Researchers have documented a variety of challenges that worker-owned cooperatives experience as a result of poor management. Most cooperative literature is focused on agriculture economics and cooperative organizations in other countries. The lack of attention in the social science literature on worker cooperatives in the United States reflects a need for further exploration of this business model. Accordingly, this qualitative case study was conducted to explore mismatches in organizational value between the organization and the employee–owners. The goal was to gather the perceptions of employee–owners and managerial personnel that could be leveraged to increase member commitment for a successful worker-owned cooperative. Person–organization fit and value congruence theories were the conceptual frameworks used to address the effect of organizational identification and member commitment as a work outcome among employee–owners. A purposeful sample of 15 respondents from multiple worker-owned cooperatives in the United States participated in virtual semi structured one-on-one interviews. Notes from reflective journaling, document review, and archival material were coded and analyzed from preliminary free codes. Study results indicated no mismatch between the organization and employee–owners; instead, the results suggested five factors that influence the perception of value. This research study is significant for employee–owners, cooperative practitioners, and cooperative scholars in the effort to increase the general knowledge and understanding of worker-owned cooperatives.

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Dedication

The year was 1994, on the east side of Detroit, Michigan, a young girl in the seventh grade heard her homeroom teacher ask the class, “What do you want to be when you grow up”? Some of her classmates’ responses were a professional athlete, a singer, a rapper, or an employee at one of the local automotive plants. However, the young girl answered, “I want to earn my PhD so people can call me ‘doctor.’” That day, after school, the young girl went home and sat in the middle of the living room floor with the Yellow Pages looking for any professional who had those magical letters behind their name. She hoped that if she called, someone would call her back. She made numerous calls with no answer. In the following days, the young girl received a call back from a psychologist who was willing to speak to her about what it takes to earn a PhD.

From that day, the young girl earned good grades and studied hard so she could make her dream of earning a PhD a reality. As the young girl grew older, she had no idea that life would present her with challenges that almost made her dream impossible. However, with a strong spiritual foundation, faith, love from her parents and family, and perseverance, she became the scholar who wrote this dissertation.

I dedicate this body of work to that young girl who knew from the age of 12 what she wanted to accomplish. I am thankful for all my life experiences: good, bad, and indifferent. The road to earning my PhD has been long and strenuous, but with God’s blessings, tenacity, and patience, I made it to the end. “The race is not given to the swift, nor the battle to the strong, but to them that endures to the end.” To God be the glory.

Acknowledgments

The African Proverb says, “It takes a village to raise a child.” I say, “It takes a village to complete a dissertation.” I was fortunate to have a village of people who championed me from the starting line to the finish line. That village includes my dissertation committee. A huge thank you to my committee chair Dr. Danielle Wright-Babb for helping me complete and finish my dissertation. I thank my methodologist Dr. Stephanie Hoon and my university research reviewer Dr. Kimberly Anthony for your expertise and contribution to my completion of this dissertation.

Thank you to the U.S. Federation of Worker Cooperatives for being a resource and partner organization. Thank you to all the worker–owners who fight every day for sustainable living wages, safe work environments, and the right to workplace democracy. I hope I honored the mission and the cooperative principles which each cooperative organization is based on with this dissertation.

To my parents, Richard Edward Broner and the late Della Broner, thank you for your love and support. Without your guidance, I would not be who I am today. Being a first-generation high-school graduate and the first to earn a PhD, I do not take this privilege lightly. To all my family and friends, near and far, thank you for your continuous support, countless phone calls, prayers, and meals. Each of you played an intricate role in this journey, and I can never repay you.

Thank you to my heavenly Father and Lord God for directing my every step on this journey. Without you, I am nothing. “A man’s heart plans the path, but God directs his steps.”

Table of Contents

List of Tables

List of Figures

Chapter 1: Introduction to the Study

Worker-owned cooperatives have persisted as an organizational form for over 150 years. However, worker-owned cooperatives are unconventional in developed capitalist economies (Nelson et al., 2016). Unconventional and unknown to some audiences and standard to others, worker-owned cooperatives have created procedures that differentiate them from traditional business structures (Nelson et al., 2016). Worker-owned cooperatives as a noncorporate business structure have adopted the philosophy of a self-managed work model while challenging the inevitability of hierarchical business management (Meyers & Vallas, 2016). In some regions of the world, worker-owned cooperatives are viewed as organizations contributing to regional sustainable economic development (Cheney et al., 2014).

Ben-Ner and Jones (1995) and Miyazaki and Neary (1985) analyzed the impact of worker-owned cooperatives on sustainable employment, and their findings support numerous studies in which researchers suggest that worker-owned cooperatives contribute to stable jobs and economic growth (Sabatini et al., 2014). Entrepreneurial literature has recognized worker-owned cooperatives as entities that embrace collective entrepreneurialism, resulting in more substantial variability to worker empowerment (Datta & Gailey, 2012). Also, cooperative companies are equivalent to or have better work performance than capitalist firms (Fakhfakh et al., 2015). Statistical data demonstrate that worker-owned cooperative business models are alternatives in job creation and provide a living wage for employee–owners (Negri Zamagni, 2012).

Within a worker-owned cooperative business model, an organization aims to mobilize its resources via the relationships with its cooperators or members (Jussila, Roessl, & Tuominen, 2014). Member commitment is the prerequisite to continuous resource mobilization (Jussial et al., 2014). Many cooperatives' challenges are lack of member apathy and the erosion of member commitment (Iliopoulos & Valentinov, 2018).

The concept of organizational identification has been linked to work outcomes such as job satisfaction (Miscenko & Day, 2016), intention to quit (Shen et al., 2014), and member commitment (Guerber et al., 2014). A less explored topic is those constructs within a worker-owned cooperative setting (Cicognani et al., 2012; Jussila et al., 2012). Cicognani et al. (2012) suggested that research literature should be conducted to further examine the gap to increase the understanding of work organizations and the influencing factors that contribute to organizational identification and member commitment.

Chapter 1 of this dissertation includes background of the study, problem statement, purpose of study, research questions, conceptual framework, nature of the study, definition of terms, assumptions, scope and delimitations, limitations, and significance of the study. The final section of this chapter will be a summary and brief introduction of the following chapters.

Background of the Study

In the United States, there are multiple ways of conducting business. Business structures depend on who owns or controls the organization and who patronizes and profits (U.S. Department of Agriculture, 2014). Worker-owned cooperatives provide an alternative business model in which collectivism is highlighted as the organization's

driving force (Birchall, 2013; Cheney et al., 2014). The ideological values of worker-owned cooperatives are based on the principles of workplace democracy, equality, and providing a living wage for employee-members (Boone & Ozcan, 2014; Cheney et al., 2014). The majority of worker-owned cooperatives globally, including those in the United States, have modeled their organizational infrastructure after the Mondragon Cooperative Corporation in Spain (Cheney et al., 2014). Mondragon has been credited for being the catalyst of cooperative organizational opportunities and has had success for over four decades (Cheney et al., 2014). However, in October 2013, Fagor Electrodomésticos, a Mondragon Cooperative Corporation business unit, filed for bankruptcy (Cheney et al., 2014).

Many worker-owned cooperatives are experiencing low retention and high turnover due to the organization closing its doors (Errasti et al., 2017). Several factors can contribute to the downfall of a worker-owned cooperative. One example is selfish workers who engage in social loafing and shrinking behavior (Ben-Ner, 2013). These behaviors are incompatible with the long-term success of the cooperative (Ben-Ner, 2013).

Theoretical and empirical literature have demonstrated that affective member commitment is a critical element in the sustainability and success of a worker-owned cooperative (Jussila et al., 2014; Winter et al., 2012). The concept of commitment comprises three components at the organizational level: the affective component is related to a member's emotional attachment, belongingness, and desire to remain a cooperative member (Cechin et al., 2013). The normative component is associated with a

member's sense of obligation to stay with the cooperative (Cechin et al., 2013). Normative commitment reflects a member's moral considerations and personal values (Jussila et al., 2014). Continuance commitment refers to the absence of alternative options other than staying with cooperative when leaving the company, results in loss of acquired advantages (Cechin et al., 2013).

An additional factor related to member commitment is intrinsic motivation at the individual level (Yidong & Xinxin, 2013). Intrinsically motivated individuals react positively to the task itself, which may correlate with satisfaction, involvement, and interest, which serves as an intrinsic reward (Yidong & Xinxin, 2013). While intrinsic motivation may explain member commitment at the organizational level, member commitment is viewed as a voluntary act that cannot be mandated (Jussila, Goel, & Tuominen, 2012).

Literature on worker-owned cooperatives shows contextual factors such as the age of employee–owners, size of the collective, employee–owners' financial well-being, and heterogeneity are antecedents of member commitment (Jussila, Goel, & Tuominen, 2012). Another antecedent of member commitment in a worker-owned cooperative setting is resource mobilization (Jussila et al., 2014). Members must be committed to the cooperative because the availability of their resources depends on it (Jussila et al., 2014). Qualitatively, member commitment to worker-owned cooperatives is the individual member's ability to connect with the organization and the cooperative society as a whole (Jussila et al., 2014).

Problem Statement

Worker-owned cooperatives as an alternative business model offer members a collective entrepreneurial experience by initiating self-organized principals while addressing market failures (Mazzol et al., 2018; Navarra & Tortia, 2014). In some countries, worker-owned cooperatives are significant contributors to the economy (Kennelly & Odekon, 2016). For example, the Italian workforce comprises 4% of worker-owned company members (Carini & Carpita, 2014). In 2015, Canada reported 7,887 nonfinancial cooperatives in the country and, of that total, 5% (228) were worker-owned cooperatives (Innovation, Science, and Economic Development Canada, 2015). As a developing country, India has the most massive growing cooperative movement to date (Kennelly & Odekon, 2016). In the United States, the total number of worker-owned cooperatives is under 1,000 (Davis, 2016), which amounts to less than 1% of all U.S. businesses (Kennelly & Odekon, 2016).

Worker-owned cooperatives in the United States are primarily concentrated in retail, service, home care, transportation, and agriculture (Berry & Bell, 2018; Davis, 2016). The U.S. Department of Agriculture (2017) reported that in 2017 there were 82 fewer cooperative enterprises than in 2016, 30 fewer marketing cooperatives, 50 fewer supply cooperatives, and two fewer service cooperatives. Coinciding with the decreasing numbers are a variety of challenges in managing worker-owned cooperatives stemming from opposing views among employee–owners, unfamiliarity with cooperative principles, and poor management (Puusa et al., 2016). These can result in weak financial status, indecisiveness from employee-owners regarding decision making, passiveness

from members, desultoriness, and a less than a firm commitment from the employee–owners (Puusa et al., 2016).

Member commitment and participation are essential to the sustainability, long-term persistence, and success of cooperative organizations (U.S. Small Business Administration, 2015). Prior literature relating to member commitment within worker-owned cooperatives has focused its attention on agricultural economics (Limnios et al., 2018). Despite research activity around the cooperative business model, there is vast neglect in social science literature and a withdrawal of scholarly attention to worker-owned cooperatives in the United States (Brintnall, 2016). The general problem is that worker-owned cooperatives face the inability of management to completely engage with the employee–owners to strengthen member commitment (Limnios et al., 2018). Specifically, the problem is that there is often a mismatch between the individual who works in a worker-owned cooperative and the organization in relation to organizational value (Ben-Ner & Ellman, 2013). The risk of mismatch between the individual and the cooperative enterprise occurs when individuals join the worker-owned cooperative. Individuals do not display the necessary characteristics (i.e., solidarity, enthusiasm, and cohesion) and the cooperative organization founders (Ben-Ner & Ellman, 2013).

Purpose of the Study

The purpose of this qualitative case study was to explore the mismatch in relation to organizational value between individuals who work in a worker-owned cooperative and the organization. The perceived organizational fit and value congruence addressed the effect of organizational identification and work outcomes such as member

commitment among employee–owners of a worker-owned cooperative. The population included employee–owners of multiple worker-owned cooperatives across the United States. I explored perceived organizational fit and value congruence as suggested by Cicognani et al. (2012) by collecting cooperative members' perspectives on worker-owned cooperatives and identifying with their organization using virtual semistructured one-on-one interviews as the primary data collection method.

Research Question

The International Cooperative Alliance (ICA, 2005–2015) provided a benchmark of values for all worker-owned cooperatives to follow. These values are self-help, self-responsibility, democracy, equality, equity, and solidarity (ICA, 2005–2015). The overarching research question for the study was: What are mismatches, if any, between individuals who work in the worker-owned cooperative and the organization in relation to organizational value?

Conceptual Framework

In this study, I aimed to explore the mismatch between individuals who work in a worker-owned cooperative and the organization in relation to organizational fit and value (Ben-Ner & Ellman, 2013). The two conceptual frameworks that shaped this study were Kristof's (1996) person–organization (P–O) fit theory and Chatman's (1989) value congruence. Both frameworks served as a lens to broaden the understanding of member commitment. In the following, I briefly describe each framework concerning this study. A thorough explanation of each is provided in Chapter 2.

Person–organization Fit Theory

P–O fit theory is an extension of the person–environment (P–E) fit theory developed by Edwards (1991). Kristof (1996) extended Edwards's theory by focusing on the link between the individual and the organization. This theory's premise matches the needs of both the individual and organization in conjunction with congruence between the individual, the organization, and the employee's ability to demonstrate and meet organizational demands (Kim et al., 2013). Previous research has shown a positive linkage between perceived organization fit and worker outcomes, such as commitment, turnover retention, and intention to quit (Cha et al., 2014; Demir et al., 2015). In this research study, the P–O fit framework identified behaviors employee–owners display to organizational identification.

From a managerial perspective, many organizations use tools to select best-fit individuals (to values, skills, and characteristics) who match the organization (Kristof & Guay, 2011). A connecting link between the individual and the organization can be related to multiple behavioral and attitudinal effects, such as commitment, increased organizational and task performance, and low turnover (Kristoff & Guay, 2011). Viewing worker outcomes such as member commitment through this conceptual lens aids in further understanding how a mismatch between individuals and the organization may happen.

Over the past two decades, the P–O fit theory has evolved with multiple dimensions to fit certain aspects of the organizational selection process, organizational culture, and organizational identification (Kristof-Brown et al., 2005; Sekiguchi & Huber,

2011; Supeli & Creed, 2014). With P–E fit being the central paradigm (Edwards, 1991), P–E theory serves as an umbrella to the multiple dimensions such as person–job (P–J) fit, person–group (P–G) fit, person–supervisor (P–S) fit, P–O fit, and person–vocation (P–V) fit (Kristof-Brown & Billsberry, 2012). Each dimension of fit focuses on different characteristics of fit (Kristof-Brown & Billsberry, 2012). For this study, I used qualitative methodology to apply P–O fit as the conceptual paradigm due to the focus on perceived fit characteristics at the individual and the organization level regarding shared values.

Value Congruence

Along with the P–O fit theory, value congruence aligns both an individual and an organization's values (Chatman, 1989; Hoffman et al., 2011). Value congruence stems from Tajfel and Turner's (1979) social identity theory, which suggests that individuals' self-awareness is determined by their group associations, which increases pride and self-efficacy. In turn, based on this theory, value congruence should positively affect an individual's attitude and work outcomes (Seong & Kristof-Brown, 2012). Edwards and Cable (2009) extended research in this field by developing a theoretical model to explain the effects of value congruence. Edwards and Cable's model included four mediators as an explanation of value congruence effectiveness: (a) communication, (b) trust, (c) predictability, and (d) attraction. Based on these explanations, researchers have determined outcomes such as commitment, job satisfaction, and intent to stay as directly connected to positive value congruence (Hayibor et al., 2011; Hoffman et al., 2011).

Previous studies have provided empirical evidence showing a positive correlation between value congruence and work outcomes such as member commitment (Kim et al.,

2013; Swider et al., 2015; Wang et al., 2011). Kristof-Brown et al. (2005) and Edwards and Cable (2009) conducted in-depth analyses of the phenomenon. Value congruence was determined most effective when enhanced communication and trustworthiness are active between the individual and the organization. In this research study, I explored perceived value congruence in effecting organizational identification and work outcomes such as member commitment.

Nature of the Study

The methodology of choice for my study was a qualitative inquiry. Many researchers view qualitative research as complex to incorporate multiple methods (Punch, 2014). A differentiating characteristic of qualitative methodology from other research methodologies is the exploration of a social phenomenon through the perspectives of the study participants (Williams, 2011). Unlike quantitative methods, qualitative research methods are multidimensional and pluralistic concerning paradigms (Punch, 2014). I used a case study as the approach to collect and analyze data.

Throughout empirical literature, there is a variety of definitions of what a case study is. Yin (2014) used a twofold purpose to define the approach (a more specific description is in the definitions section of this chapter). Thomas (2011) focused on the epistemological typology of case study research by emphasizing the design distinction. The first part is the subject of the study, and the second is the object that may use a theoretical frame to view the matter (Thomas, 2011). Coinciding with Punch's view of qualitative research as multidimensional, Stake (2005) posited that a case study is not a methodological choice but a choice of what is to be studied by whatever methods are

selected to investigate the case. Generally, a case study involves a detailed, holistic, in-context study of one or more cases with a generalization of theoretical propositions (Punch, 2014; Radley & Chamberlain, 2012).

Using a qualitative case study approach met the methodology needs of this research study. My interest in this study was to explore the perspectives and viewpoints of employee–owners of worker-owned cooperatives about organizational fit and value. Furthermore, I sought to identify and understand subsequent behaviors that may underlie a worker–owner's intention to quit the organization and member commitment.

Data collection incorporated virtual semistructured one-on-one interviews with employee–owners of worker-owned cooperatives and managerial members, reflective journaling, document review, and use of archival material. In combination with virtual semistructured one-on-one interviews, I used archival material as a methodological triangulation method for data collection. Denzin and Lincoln (2011) noted that methodological triangulation is an alternative to validation and is an attempt to secure an in-depth understanding of the phenomenon in question.

Definition of Terms

Case study: An in-depth investigation using multiple methods and sources of data to examine a phenomenon within a real-life context (DeMassis & Koltar, 2014).

Member commitment: A member's desire to remain attached to an organization bringing a sense of belonging and self-esteem to the member (Jussila, Goel, & Tuominen, 2012), and a variable capturing the likelihood of a member of a worker-owned

cooperative choosing to maintain their membership and patronage in the cooperative (Jussila et al., 2014).

Organizational culture: The shared underlying assumptions, values, and beliefs that describe an environment and teach individuals within the environment in the appropriate manner to think, feel, and communicate (Zohar & Hoffmann, 2012).

Organizational identification: The state in which an organizational member perceives belongingness with the organization and represents themselves regarding their membership (He & Brown, 2013).

Worker-owned cooperative: A firm in which firm employees own all or most of the capital, whether individually or collectively; where all employees have equal access to members regardless of their occupational group; and where each member has one vote, irrespective of the allocation of any individually owned capital in the firm (Perotin, 2014, pg. 35).

Assumptions

The conceptual frameworks that I used for this research study are from industrial/organizational psychology and management disciplines. The conceptual frameworks served as a theoretical basis for this research. There are serval common assumptions that a researcher may assume to be true (Gioia et al., 2012). The hypotheses related to this study were the trustworthiness of participants' responses and that each participant would not presume a bias. Also, I assumed those study participants would give 100% effort in participating in this study.

In addition, I assumed that participants in this study would be knowledgeable with cooperative principles. Coinciding with knowledgeability, Gioia et al. (2012) noted that people could construct their organizational realities, and these people are knowledgeable agents with the capacity to explain their thoughts, intentions, and actions. Furthermore, I assumed in acknowledging participants' knowledge of their organizational reality. I also thought that participants would be truthful in their responses to the open-ended questions presented during one-on-one interview processes and their perceptions of organizational existence. Additionally, I assumed that interpretations of this study would be generalizable. Transferability is discussed further in the limitations section of this chapter.

Scope and Delimitations

Delimitations describe the characteristics that limit the scope and define the conceptual margins of a research study (Yusuf, 2014). Based on the boundaries I set for this research study, a delimitating element was the study participants' computer software knowledge. I selected to explore worker–owners of multiple worker-owned cooperatives in the United States using video conferencing software as a data collection tool. Due to the decision to conduct a single case study, exploring the research phenomenon with multiple worker-owned cooperatives and using internet technology is further discussed in Chapter 3.

I selected P–O fit theory and value congruence as the conceptual frameworks for this study. As mentioned previously, the P–O fit theory is a dimension under the P–E fit

umbrella (Kristof-Brown & Bilsberry, 2012). Based on the research questions for this research study, the selected conceptual frameworks fit best with the study's focus.

Limitations

The transferability of the result is a limitation of this study. Due to the similar nature of the organization under exploration, transferability across industries may be limited or impossible. O'Reilley and Parker (2012) noted that qualitative researchers make decisions associated with adequacy based on saturation. In addressing this limitation, I focused on sample adequacy and the depth and breadth of the information collected.

For this study, I used computer communication software to conduct video interviews via videoconferencing. A virtual interview setting may be uncomfortable to some participants, resulting in participants not expressing their perceptions and experiences in the discussion or not participating in the study. I addressed this limitation by providing participants instructions on downloading and setting up the free computer communication software to a computer, smartphone, or tablet. I also contacted each study participant via email, asking for additional comments and input regarding the interviews, ensuring statements through this process they would be anonymous and their information confidential.

Significance of the Study

Researchers such as Birchall (2013) have criticized worker-owned cooperatives' effectiveness. Brichall (2013) predicted that during an economic recession, worker-owned cooperatives flourish with a renewed commitment to organization principles from

employee–owners, but once economic revitalization occurs, commitment ceases. Kokkinidis (2014) challenged the ideology of worker-owned cooperative effectiveness during an economic recession by qualitatively exploring worker–owner values. Based on member values and work practices, worker-owned cooperative employee–owners develop aspirations of creating a healthy workspace that emphasizes collective working, egalitarianism, and autonomy (Kokkinidis, 2014).

My goal was to expand the knowledge about worker-owned cooperatives, specifically in the United States, regarding alternative business structures and practices. Additionally, this study contributes to the existing body of empirical literature attempting to explain contributing factors that influence member commitment within worker-owned cooperatives. Worker-owned cooperatives are an understudied work organization in the research literature (Cicognani et al., 2012). In this study, I used virtual semistructured one-on-one interviews with study participants, reflective journaling, document review, and archival material to triangulate and synthesize data to understand contextual factors associated with member commitment from worker–owners of worker-owned cooperatives.

Significance to Practice

I used a different ideology in offering an alternative method to conventional organizational structure as in traditional business settings. Self-managed firms such as worker-owned cooperatives embrace a leadership style that includes a collective process in which leaders willingly share power and employees gain new roles in the organization

(Kokkinidis, 2014). Individuals who are a part of worker-owned cooperative enterprises share similar goals and values (Ben-Ner & Ellman, 2013).

This research sought to contribute to the emerging field of collective entrepreneurship. This research focused on worker-owned cooperatives rather than traditional forms of entrepreneurship, leadership, or conventional investor-owned firms. By engaging in exploring this unorthodox business model, I intended to add to the understanding of worker-owned cooperative practices, governances, and structures. Calàs et al. (2009) suggested a need to reframe the basic premise of mainstream entrepreneurship fundamentally. Entrepreneurship should be considered a social change activity with various outcomes with the potential of social impact (Datta & Gailey, 2012). The findings of this study promote an increase in the general knowledge of the concept of worker-owned cooperatives and assist these types of organizations in selecting the best fit individuals who align with the vision and culture of the organization.

Significance to Theory

Byrne et al. (2012) posited that researchers should view member commitment as a qualitative piece of a member's relationship with their cooperative society. Cooperative research has been conducted to examine the concept of member commitment using theoretical and conceptual frameworks such as the utilitarian approach (Byrne & McCarthy, 2005; Jussila, Goel, & Tuominen, 2012), social exchange theory (Emerson, 1972; Jussila, Byrne, & Tuominen, 2012), organizational sense of community, and organizational identification (Cicognani et al., 2012). I focused on the less explored construct of organizational fit on the individual and organizational levels.

Perceived congruence can reflect a member's relationship with the organization as an entity and assisting the employee in identifying with the organization (Gonzalez & Chakraborty, 2012). The results of this study reflect the perceived values of employee–owners from their perspectives. I aimed to advance research in organization fit and value congruence by exploring a unique homogenous work environment where values such as workplace democracy are encouraged.

Significance to Social Change

Positive social change is the core of social science inquiry (Aguilera et al., 2007). The significance of this study was to provide cooperative development practitioners and researchers a holistic lens through which to explore the antecedents of value congruence and organization identification in a worker-owned cooperative environment. This study offers a foundation in which practitioners and researchers can understand critical issues that affect the organizational production of the cooperative company. In promoting member commitment, retention, and organizational identification, value congruence between the individual and the organization can increase professional efficacy, commitment, and lower turnover intention (Cicognani et al., 2012).

Summary and Transition

Research in cooperative organizations has shown member commitment as a critical subject for sustainable and successful cooperative companies (Jussila, Byrne, & Tuominen, 2012; Jussila et al., 2014). Cooperative values play a central role in defining the identity of a work organization (Cicognani et al., 2012). When motivation and the decision to stay with a cooperative organization are affected on the individual level, this

reflects the difference between values and practices of the organization and individual (Cicognani et al., 2012).

Jussila, Byrne, and Tuominen (2012) posited that a cooperative organization should actively represent employee–owners' collective interests to manifest the core ideology of cooperation. Research has provided various explanations for this phenomenon (Ben-Ner & Ellman, 2013). The risk of mismatch between a worker-owned cooperative and an individual remains (Ben-Ner & Ellman, 2013). One assumption as to why there is a mismatch between a worker-owned cooperative and an individual is when the organization experiences turnover, new members do not express the same level of enthusiasm or efficacy as the original employee–owners of the cooperative (Ben-Ner & Ellman, 2013).

In this chapter, I discussed the alternative business model of worker-owned cooperatives and the understudied issues of cooperatives in the theoretical and empirical literature. I included a brief overview of challenges this organizational structure encounter, such as member commitment and intention to quit. Also, I provided a rationale for this study which was to explore the mismatch between the individual who works in a worker-owned cooperative and the organization in relation to organizational value. I introduced the conceptual frameworks that I used to shape the research of this study which were person–organization fit theory and value congruence. Finally, I addressed assumptions, limitations, scope, delimitations, and how the significance of this study contributes to practice, theory, and social change.

Chapter 2 provides my methods for collecting literature and an in-depth analysis of the conceptual frameworks mentioned in Chapter 1. Chapter 2 concludes with an exhaustive literature review of current literature, including history and definition of the study's worker-owned cooperative organization, methodology, and scope. Chapter 3 provides an in-depth description of the research methodology, design, population, researcher role, procedures, data collection and analysis plans, and virtual semistructured one-on-one interview parameters for study participants. Chapters 4 and 5 provide discussions on the study results and my conclusion and recommendations for future research.

Chapter 2: Literature Review

The purpose of this qualitative case study was to explore the mismatch between the individual who works in a worker-owned cooperative and the organization in relation to organizational value. In this chapter, I present a detailed literature review based on an exhaustive search of critical conceptual and theoretical frameworks that make up this research study's foundation. In this chapter, I highlight the gap in the literature regarding employee–owners of worker-owned cooperatives. Using P–O fit and value congruence theories, I demonstrate contextual factors from each framework that contribute to individuals' willingness to improve work outcomes such as member commitment in this type of organizational setting.

Individuals who are a part of employee–ownership/profit-sharing organizations perform as well as or at a higher rate than individuals employed with conventional firms (Wu et al., 2017). Despite good performance and productivity of employee–owners, worker-owned cooperative leaders have identified uncertainty (Boland et al., 2011) and lack of member commitment (Jussila, Goel, & Tuominen, 2012) as managerial difficulties. Hogeland (2015) argued that these organizations operate as two organizations trying to be one due to a split in cooperative organizational values. Managerial difficulties can lead to multiple identities while capturing the tension between the employee–owner and the organization (Hogeland, 2015). The tension between the individual and the organization can contribute to worker-owned cooperatives experiencing collective action issues among employee–owners, where some individuals partake in free-rider behavior (Cook, 1995).

Doucette (1997) suggested that member commitment to an exchange relationship contains long-lasting confidence that positive returns will result from the continued association between parties. Also, given the vital role that member commitment plays in the success of a worker-owned cooperative, identifying contextual factors that influence member commitment is equally essential (Doucette, 1997). Contextual factors linked to achieving desired outcomes associated with member commitment can include trust (Barber, 1983), satisfaction (Anderson & Narus, 1990), loyalty to other members (Thibaut & Kelley, 1959), the exchange of information (Heide & John, 1992; Morgan & Hunt, 1994), and suitability of alternatives (Dwyer et al., 1987; Thibaut & Kelley, 1959).

When identifying additional contextual factors to understand member commitment in an organization (other contextual factors identified in Chapter 1), there is a remaining gap regarding factors individuals hold essential in determining the organization, its culture, and its values (Besharov, 2014; Cicognani, et al., 2012). Also, there is a critical need to understand how identification emerges regarding which organizational value is essential from the individual perspective (Besharov, 2014). Therefore, organizational values are a component that can be more easily studied as an expression of organizational culture (Cicognani et al., 2012, p. 1091).

The literature discussed in this chapter consists of primarily current and seminal materials that serve as a framework supporting this research study. In the first section, I provide a definition, brief history, and description of worker-owned cooperatives. In addition, I discuss the current state of worker-owned cooperatives in the United States. In the second section of the literature review, I focus on member commitment and

organizational identification with the alternative business model. Additionally, in this section, I focus on current research literature on cooperative business organizations in which researchers have explored organizational fit, value, and member commitment as critical components of the success of a worker-owned cooperative. Finally, I discuss the strengths and weaknesses of current literature concerning this subject matter and how I intend to contribute. This chapter concludes with a proposal of research methodology suitable for the study and a summary.

Literature Search Strategy

Information were located in peer-reviewed, scholarly journals, with most publications publishing within the last 5 years; other related literature exceeds the 5-year window. The literature search conducted for this research study consisted of scanning multidisciplinary electronic databases in the Walden University library, such as Academic Source Complete, Business Source Complete, Business Management, and Accounting, and Education Research Complete. Additionally, external sources such as Google Scholar, Wayne State University Purdy-Kresge Library, Eastern Michigan University Bruce T. Halle Library, and WorldCat were used to locate primary literature. I used top-tier management, economic, entrepreneurship, and psychology journals with full-text articles through databases such as EBSCOhost, Emerald, ProQuest, and Sage. Key search terms and phrases commonly used in cooperative and related research literature include *cooperatives, cooperative enterprises, employee-owned businesses, member commitment, member-owned businesses, organizational culture, organizational*

identification, person-organization fit, self-managed firms, value congruence, and *worker-owned cooperatives.*

In addition to using key search terms, I used a combination of Boolean operators to assist in identifying topic-related literature. Many of the articles from my search I retrieved from references within articles and related seminal literature. The information gathered from the research literature produced an array of studies on the benefit of worker-owned cooperatives and the effect, use, and contribution P–O fit theory had on the individual/employee and organization. Literature used in this review was limited to peer-reviewed, scholarly journals, field-related reference books, and conference papers.

The literature search led to 266 articles. This total reflects articles collected from peer-reviewed scholarly journals published in the past 5 years; this total excludes journal articles and books from original research and material on research methodology. Ten documents (articles from peer-reviewed scholarly journals) are from seminal works. These articles were located using the search databases previously mentioned.

The significant concepts examined in this literature review comprise member commitment (Jussila et al., 2014), organizational identification (He & Brown, 2013), person-organization fit (Cable, 1996; Cable & Judge, 1994; Judge & Bretz, 1994; Kristof, 1996; Kristof-Brown, 2000; Kristof-Brown et al., 2005; Lauver & Kristof-Brown, 2001), value congruence (Adkins et al., 1994; Boxx et al., 1991; Chatman, 1989; Cicognani et al., 2012), and worker-owned cooperatives (Ben-Ner & Ellman, 2013; Birchall, 2012; Dunkelberg et al., 2013; Jussila, Bryne, & Touminen, 2012; Perotin, 2014). Articles selected for this review assist in an understanding of each primary concept. Specifically,

articles from Jussila et al. (2014) and Jussila, Goel, and Tuominen (2012) focus on member commitment within a worker-owned cooperative setting.

The literature review's original works include literature from Chatman (1989) and Kristof-Brown (1996). Chatman (1989) presented theoretical evidence of the importance of unity between an individual and the organization values. Kristof-Brown (1996) proposed a conceptual model that illustrates the supplementary and complementary perspectives of P–O fit. Literature from both researchers contributes to the identification of the topic.

The selection process for finding relevant study literature posed a challenge in finding literature that addressed the management research questions about worker-owned cooperatives. The majority of worker-owned cooperative literature I retrieved from economic journals was published outside of the 5-year range. There was a limited selection of literature addressing worker-owned cooperatives in scholarly management journals.

I found an article from the P–O fit framework that referred to value congruence as an antecedent of the framework in my search. I grouped articles according to concept/framework to observe commonalities with key search terms, definitions, and qualitative analysis. This method provided an effective way of assessing a large amount of relevant material in this exhaustive literature search.

The conceptual framework section of this chapter is focused on some precursors of P–O fit and value congruence as it relates to worker-owned cooperatives. Also, I provide the origin of the frameworks and how these concepts have been used in previous

topic-related works. Other literature I use in this section includes Cable and Judge (1994), Edwards (1994, 1995) and Edwards and Cable (2009).

Conceptual Frameworks

Person-Organization Fit

Organizational behaviorists believe that a good fit between an individual employee and an organization is vital for fit outcomes, such as goal attainment, attitude, performance, and values (Kristoff-Brown et al., 2005). A basic definition of P–O fit is the compatibility between an individual and an organization that occurs when at least one provides the other with needs or they display a shared similarity of fundamental characteristics or both (Kristoff, 1996; Kristoff-Brown et al., 2005). However, differentiating multiple conceptualizations of P–O fit and other dimensions of P–E fit (i.e., P–J fit, P–G fit, and P–V fit) can be confusing (Kristof, 1996).

To aid in the clarification of P–O fit, Kristof's (1996) research on fit theory expanded Muchinsky and Monahan's (1987) fit model. Muchinsky and Monahan (1987) identified two conceptualizations of fit: supplementary and complementary fit. The difference between the two concepts is how the environment is defined (Ahmad, 2010). Supplementary fit occurs when individuals possess characteristics similar to other individuals in the background (Kristof, 1996; Muchinsky & Monahan, 1987) or the environment identified as the individuals who occupy it (Ahmad, 2010). Examples of supplementary characteristics of an organization include climate, culture, values, goals, and norms (Kristof, 1996; Lauver & Kristof-Brown, 2001). With the individual side of supplementary fit, characteristics include personality, attitude, values, and goals (Kristof,

1996; Lauver & Kristof-Brown, 2001). When characteristic similarities exist between the two entities, it is an indicator of supplementary fit (Kristof, 1996; Sutarjo, 2011).

Complementary fit occurs when individuals' characteristics or the organization's characteristics add to any missing dynamics of either party (Kristof, 1996; Muchinsky & Monahan, 1987). Consequently, this tradition of fit with the P–O paradigm offsets the weakness of either the individual or the organization by the other's strengths (Cable & Edwards, 2004; Muchinsky & Monahan, 1987). Therefore, complementary fit can imply that an employee has the necessary skills that an organization requires or that an organization offers the employee the rewards the employee desires (Cable & Edwards, 2004).

Both supplementary and complementary conceptualizations of fit can identify personal connections of supply and demand on the organizational and the individual level (Kristof, 1996). Examples of organizational supply include monetary, physical, and psychological supply in conjunction with advancement opportunities demanded by individual employees (Kristof, 1996; Sutarjo, 2011). In the event organizational supply meets individual demands, need–supply fit exists (Kristof, 1996). Additionally, organizational demands include contributions from the individual in the form of time, effort, commitment, knowledge, skills, and attributes (Kristof, 1996; Kristof-Brown et al., 2005). When individual supply coincides with organizational demands, demands–abilities fit (Kristof, 1996) and both the demand–supply relationships are a description of complementary fit (Kristof, 1996; Kristof-Brown et al., 2005; Sutarjo, 2011). Figure 1 is an illustration of the various dimensions in which fit or misfit can happen.

Figure 1

Different Conceptualizations of Person–Organization Fit

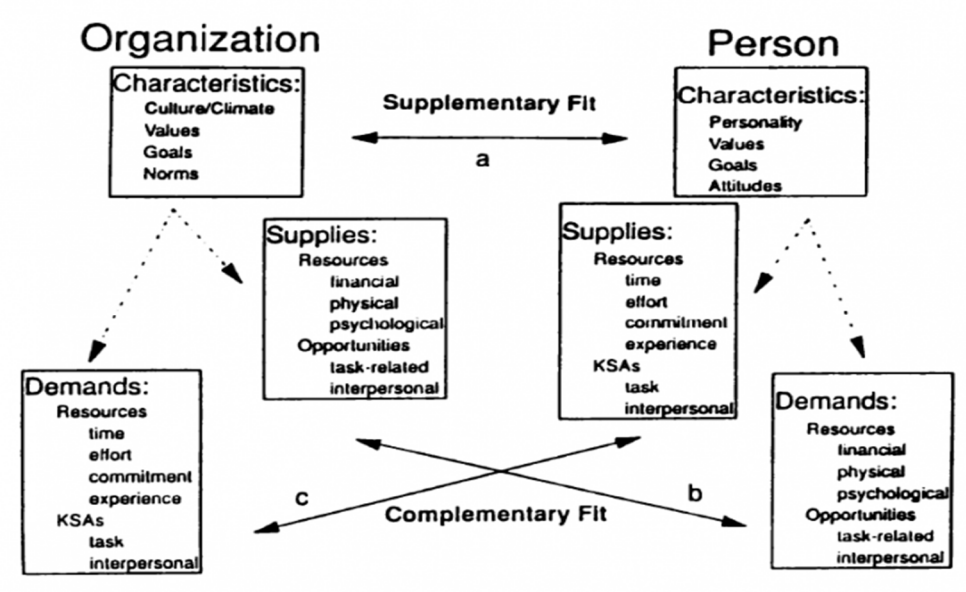

Figure 1: **Various Conceptualizations of Person-Organization Fit**

Note. Adapted from "Person-organization fit: An Integrative review of its conceptualizations, measurement, and implications," by A. L. Kristof, 1996, *Personnel Psychology, 49*, p. 4. Copyright 1996 by Personnel Psychology.

Researchers focused on supplementary fit have identified value congruence between an organization and an individual as the most frequent operationalized perspective in fit theory (Chatman, 1989, 1991; Judge & Bretz, 1992). Chatman (1991) noted that value congruence is essential in exploring fit theory because values are a fundamental component of organizational culture that shapes individual employee behavior. Posner (1992) used the exact description of P–O fit value congruence in an investigation of the influence of demographic factors (i.e., age, gender, organizational level, and management position) on work attitudes. Demographic characteristics do not

moderate the relationship, but P–O fit value congruence correlates to positive work attitudes (Posner, 1992).

Chatman (1991) noted that P–O fit is influenced by organizational values that exist when an individual enters the organization and by any changes in individual values post organizational entry and tenure. The selection process matches the individual and the organization based on similarities such as values (Cable & Judge, 1996; Chatman, 1991). Empirical researchers have shown that individuals make job choice selections based on P–O fit and attraction (Cable & Judge, 1996; Chatman, 1991; Sekiguchi & Huber, 2011).

Schneider's (1987) attraction–selection–attrition (ASA) framework suggests that organizations are functions of the individuals they have, and the individuals within the organizations are a part of the ASA lifecycle (Schneider, 1987). Literature from interactional psychology has demonstrated that individuals are not separate from the organizational environment they belong to because they make the place (Schneider, 1987). In Bretz et al.'s (1989) empirical investigation, the researchers hypothesized that congruence between internal needs and external environments predicts the organizational selection process. In addition, individuals attracted to a particular organization are more homogeneous than individuals in the general pool, revealing weak and marginal support for both hypotheses. The study results showed that the assumption of workplace/force homogeneity might be more multifaceted than considered initially.

Guided by Edwards (1993) and Judge and Bretz (1992) contributions to P–O fit theory, Cable and Judge (1996) investigated job-seeker and new employees' subjective P–O fit perceptions in the context of job selection and work attitudes relative to

organizational factors. The results from their analysis align with research from Chatman's (1989) and Kristof's (1996), indicating that job seeker's subject P-O fit stems from congruence between the organizations' perceptions and values. Hoffman and Woehr (2006) and Kristof et al. (2005) conducted meta-analyses that included over 200 articles that examined the relationships between multiple dimensions of P–E fit with per/post-entry individual–level criteria and behavioral outcomes. These meta-analyses provided quantitative summaries of the correlation between P-O fit and behavioral outcomes, which revealed a positive relationship between P-O fit and various behavioral outcomes.

The role in which P–O fit plays in the employment experience, and organizational outcomes, suggests that long-term outcomes such as low turnover, positive work attitudes, work performance, and commitment are reflective manifestations of the alignment of individual-organizational congruence (Kristof, 1996). Considering the positive outcomes of P–O fit in conjunction with the two traditional conceptualizations of fit (i.e., supplementary and complementary fit), this research study focused more on the tradition of supplementary fit due to its correlation to values. Also, supplementary fit attributes to the prediction of organizational preference (Kristof, 1996).

Value Congruence

Researchers have examined the concept of values concerning job selection for many years (Adkins et al., 1994; Chatman, 1989, 1991). A critical aspect of both individuals and organization's comparability directly and meaningfully is values (Barley et al., 1988; Chatman, 1989,1991; Schein, 1990). Values are intrinsic beliefs of what is fundamentally right or wrong (Judge & Bretz, 1992). Individuals rely on their values to

guide their decision making and actions (Edwards & Cable, 2009). Organizations use value systems to provide norms that specify how members of the organization should act and instructions for allocating resources (Edwards & Cable, 2009). Within the supplementary tradition of P–O fit theory, values are defined as (a) beliefs that transcend specific situations, (b) relates to desirable end states or behaviors, (c) a guide for the selection or evaluation of behavior and events, and (d) differ in terms of relativeness (Schwartz, 1992).

To better understand values at the individual and the organizational level, Schein (1985) recommended that it is equally important to understand what organizational culture is. Organizational culture is defined as patterns of shared assumptions that the group learned in relation to solving problems internally and externally well enough to be validly considered to be taught to new members of the organization as the correct way to think, feel, and behave (Schein, 1985). There are three dimensions of culture (Cicognani et al., 2012). Schein (1985, 2010) identified the three dimensions of culture as artifacts, implicit assumptions, and values. Artifacts are things in the organization that an individual can touch, see, or hear, such as rituals, offices, or furnishings (Schein, 1985). Implicit assumptions are components of culture unseen and may not be cognitively recognized in everyday actions between employees (Cicognani et al., 2012; Schein, 1985). Lastly, Schein's interpretation of organizational values coincides with the above definition by Schwartz (1992).

Theoretically, value congruence refers to the similarity between the individual's values and the organization's value system (Chatman, 1989; Kristof, 1996). Tsui and

O'Reilly (1989) suggested that an individual's attitudes and behaviors are affected by shared value congruence with others who are similar to them. For instance, individuals who share similar values with others within an organization show improved communication and an increase in predictability in social interactions (O'Reilly et al., 1991; Tsui & O'Reilly, 1989). Therefore, individuals with shared values have similar cognitive processing (Kalliath et al., 1999). The reflection of organizational value systems on the employee's value congruence exists. (O'Reilly et al., 1991).

To understand the connection between the person and organizational value congruence, Liedtka (1989) recommended that researchers examine the interaction between personal and organizational values in conceptually understanding the phenomenon. Also, the value congruence model developed by Liedtka (1989) looked at situations with contention or congruence between individual values and the organization's values based on organizational culture. Based on this model, Posner and Schmidt's (1993) research determined that consonance from both value systems (individual and organization) is essential in developing a positive organizational culture. Liedtka (1989) and Posner and Schmidt (1993) emphasized that when individuals' values align with the organization they selected for employment, positive work outcomes such as a sense of commitment are many positive consequences.

Like Liedtka (1989), Chatman (1989) also developed a model that evaluated individual and organizational value profiles to determine fit. Chatman's research encourages the use of the P–O fit framework so that researchers and practitioners can identify similarities and discrepancies between individuals and organizational values

(Chatman, 1989). Once the P–O fit framework is assessed, researchers can make predictions about specific outcomes and changes in organizational norms, if any (Adkins et al., 1994; Chatman, 1989). In Chatman's later work, she examined the role in which P–O fit operationalized value congruence between work values of the individual and the organization (Chatman, 1991). From this investigation, the results determined that when an individual is new to an organization that also measured high with P–O fit work value congruence, these individuals adjusted more quickly to the organizational culture, job satisfaction increased, and intention to quit was low (Chatman, 1991).

Cicognani et al. (2012) study used a sequential mixed methodology to investigate the role of value congruence and the influence of organizational identification within a worker-owned cooperative work culture. The study mentioned in this review inspected P–O fit and value congruence in the tradition/corporate work setting. The results of this study showed that employee-owners perceived the cooperative as living up to its core organizational values and showed higher organizational identification (Cicognani et al., 2012).

Finally, despite the positive outcomes of value congruence on the individual and organizational level, if there is a conflict or discrepancy of values between the person and the organization, often it is the individual that finds themselves making trade-offs between work they want to do or have to do (Cicognani et al., 2012). Write and Pandey (2008) and Amos and Weathington (2008) noted that conflict in values could result in employee burnout, lack of commitment, increased intention to leave the organization, and decreased professional efficacy. Kristof-Brown (1996, 2005) and other field researchers

have shown the relevance of P–O fit and value congruence. From the congruency of values on the individual and organizational level, there can be a healthy development of norms, guidelines, and expectations that dictates organizational behavior (Cicognani et al., 2012).

Literature Review

As noted in the previous sections of this chapter, the following section of this literature review include current field-related literature that addresses the willingness to improve work outcomes such as member commitment within a worker-owned cooperative. The first portion of this section provides a brief history of worker-owned cooperatives, the modern cooperative movement in the United States, and The Mondragon Cooperative Group in Basque Country, Spain. The remainder of this literature review will consist of a body of research and one specific study by Cicognai et al. (2012), which this research dissertation is inspired. Additionally, it includes a review of the research methodologies used and my rationale for the research method for this study.

Brief History of Worker-Owned Cooperatives

The scope of cooperative activity in the modern world has been in existence for more than 200 years after civil and capitalist forms (Zamagni, 2012). Cooperatives have linked many social movements of development in capitalist systems (Nockovic & Golja, 2014). The modern cooperative movement's earliest record dates back to 1761 in Scotland. Workers sought an alternative to dehumanization, exploitation, and immiseration due to industrial capitalism (Ratner, 2013). This call to action inspired the

socialist and trade union movements to connect with the cooperative movement in supporting each other to create cooperativism (Ratner, 2013; Wright, 2014). Both the cooperative and socialist movements pursued an economy that was democratically run by the workers who produced a collective social wealth (Ratner, 2013).

Theorists such as Marx, Engels, and Lenin developed critiques addressing cooperativism as an alternative to capitalism (Jossa, 2014; Ratner, 2013). Marx's reflections proposed that cooperatives are on the margins of opposition as a form of transition between capital and labor (Paranque & Willmott, 2014). Also, Marx viewed cooperatives as a form of company in which opposition between capital and labor is abolished (Paranque & Willmott, 2014). Even though Marx's theories on cooperative organizations were based on producer cooperatives (Jossa, 2014), Lenin, Engels, and Gramsci praised the cooperative movement and suggested that cooperative organizations provide new production modes via cooperation (Jossa, 2014). Also, cooperatives are a necessary form of economic democracy in developing a neo-socialist economic democracy (Ratner, 2013).

Utopian socialist Robert Owen is credited as an essential contributor to modern cooperativism and coining cooperativism and socialism (Altman, 2014; Martin, Martin, & Martin, 2014; Ratner, 2013). Owen assisted in developing the first trade unions in Britain, presided over eight cooperatives, and influenced the philosophy and practice of cooperativism and social reform (Martin et al., 2014; Ratner, 2013). Owen's ideology of community and cooperation created the foundation on which modern cooperatives are based (Ratner, 2013).

In the nineteenth century, western historical evidence credits the Industrial Revolution as the catalyst for shaping the contemporary characteristics of modern-day industrial society and devices of its progress (Curl, 2012). As a counter-reaction to capitalism's political, social, and economic forms during the Industrial Revolution, workers were recognized for creating fair opportunities for themselves (Forno & Graziano, 2014; Wright, 2014). This act led to the emancipation of traditional formal schools of thought, including Marxism and the theory of alienation (Curl, 2012; Wright, 2014).

Despite the deplorable conditions and inequalities formed from the Industrial Revolution, this historical occurrence increased productivity (Martin et al., 2014). An example of such development is the Rochdale Pioneers. An assembly of 28 men collectively formed the Rochdale Equitable Pioneer Society, contributing to the ethical trading of dividends on purchases (Walton, 2015) and the local community's survival (Mitra, 2014). In the effort of advancing their cause by achieving social objectives through economic activities (Oczkowski et al., 2013), the Rochdale Pioneers established nine cooperative principles known as the Rochdale Principles. The original principles stated (Birchall, 2014): (a) democracy, (b) open membership, (c) fixed and limited on capital, (d) distribution of the surplus as dividend on purchased, (e) cash trading, (f) sale of only pure and unadulterated goods, (g) education, (h) political and religious neutrality, and (i) disposal of net assets without profit in the event of the society being wound up.

From implementing these principles from the Rochdale Society, their cooperatives set a standard of effectiveness as a business structure to withstand the

challenges associated with economic hardship within non affluent communities (Mazzarol et al., 2014). During the late 1800s through the 1930's the cooperative movement experienced a global expansion that promoted the middle class's growth (Curl, 2012; Mazzarol et al., 2014). Throughout the 20th century, the modern cooperative movement as it was known was changing due to the effects of World War II and the Great Depression (Mazzarol et al., 2014). Mazzarol et al. (2014), for example, noted that during the recovery period from the Great Depression and the Second World War, the socialist movement and followers of Marxism aggressively addressed the economic disadvantages of the poor. The cooperative movement sought a peaceful, non political rationale for democracy, fairness, and equality (Mazzarol et al., 2014).

During the early part of the 20th century, cooperatives in the United States experienced a decline in membership and production due to economic hardship due to World War II (Curl, 2012; Wright, 2014). From this crisis, the self-help movement acted as the renaissance of cooperativism by exchanging labor services and goods (Wright, 2014). After the Second World War, companies begin to restructure their business models, where employee ownership became more frequent (Cheney et al., 2014; Curl, 2012). Through a shareholding system, employee ownership stock programs (ESOPs) emerged as a means for employees to become owners of the company that they work for by investing in stocks (Curl, 2012; Gupta, 2014). Though this form of employee-ownership differs from cooperative ownership, both styles of employee ownership show empirical evidence that employee-ownership positively influences organizational level outcomes (Thompson et al., 2013).

The 1950s, 1960s, and 1970s showcased local cooperative federations and farming co-op's (Curl, 2012). Many cooperatives, specifically agricultural cooperatives, experienced growth through mergers to remain relevant (Chaddad & Lliopoulos, 2013). Successful enterprises that benefited from this cooperative merger boom during this era are Land O' Lakes, Ocean Spray, Welch's, and Sun-Maid (Curl, 2012). Along with others like them, these companies sparked cooperative development across the US (Wright, 2014). However, many cooperatives did not share the same success. Many cooperative organizations degenerated into semicapitalist firms or were sold to conventional corporations (Curl, 2012; Wright, 2014).

Meanwhile, Mondragon Cooperative Group begins to gain momentum with growth and has positioned itself as the flag star enterprise and blueprint for employee-owned alternative organizations (Heras-Saizarbitoria, 2014). Mondragon Cooperatives' history dates back to 1956, with less than thirty employees looking to develop a solution to socio-economic inequality (Witherell, 2013). With its central headquarters of operation located in Basque Country, Spain, Mondragon Cooperative Group today has 289 institutions, including over 100 cooperatives, 147 subsidiary companies, several foundations, benefit societies, umbrella organizations, and international services (Flecha & Ngai, 2014).

With international expansion as the current venture of Mondragon, the organization currently has corporate offices in 40 counties, including the United States, and exports to more than 150 countries (Flecha & Ngai, 2014). Additionally, according to its annual financial report, in 2018, Mondragon's total reported income was over USD

146 million, with 38,722 employee-owners working in 141 cooperatives internationally (Mondragon Corporation, 2018). Curl (2012) noted that the Mondragon Cooperative Group partnered with the United Steel Workers Union in October 2009 to convert many steel plants into worker-owned and run cooperatives. This partnership permits Mondragon to implement a proven successful business model in other organizational structures. Furthermore, the expansion of and collaboration of the two organizations exhibits its worker-owners investments as part of a broad-based labor movement (Witherell, 2013).

Since its inception, The Mondragon Cooperatives has built a unique business model embedded in the basic core principles of cooperation and represents the span of possibilities for other worker-owned cooperatives (Cheney et al., 2014). Despite the fluctuation and financial status of the world economy, Mondragon has remained a competitive presence in the industrial, economic, technology, and educational markets (Cheney et al., 2014; Flecha & Ngai, 2014). Mondragon's commitment and dedication to democratic and fair work practices have made the organization a leader in the industry (Flecha & Ngai, 2014).

As cooperatives further evolve and plan for the future, the founding principles still play an integral role in the operations of worker-owned firms (Cracogna et al., 2013; Heras-Saizarbitoria, 2014). With organizations such as the International Cooperative Alliance (ICA), the overall mission of cooperative firms is to continue to promote autonomy and build alternatives to capitalization through workplace democracy and solidarity (Curl, 2012). This alternative business model has created and can continue to

create sustainable jobs that support communities worldwide and organize workers that encourage collective entrepreneurship (Witherell, 2013). Worker-owned cooperatives have experienced a steady increase in finance, health care, marketing, advertising, engineering, law, and information technology industries (Altman, 2015; Birchall, 2013; Cheney et al., 2014).

The Cooperative Company

A consensus exists in cooperative literature regarding a human's propensity to cooperate or self-manage (Lorenzo, 2013). The terms cooperate, and self-management is used interchangeably. Lorenzo (2013) noted that it is essential to know the difference between the two terms. Regarding the term cooperatives (specifically worker-owned cooperatives), Lorenzo (2013) identified the term as a specific type of property or production that implies a particular production method. At the same time, self-management is the conceptualization of including a particular type of a person or a group of people who share an outlook and code of conduct viewed as a way of life not limited to the process of production (Lorenzo, 2013).

With defining worker-owned cooperatives, Ben-Ner and Ellman (2013), Birchall (2013), and Pérotin (2014) all agreed that there is no consensus existing in current literature for a unified definition of what a worker-owned cooperative is. For this literature review and research study, I will use the Pérotin (2014) definition. Pérotin (2014) defined a worker-owned cooperative as a firm in which most or all the capital is owned by the organization's employees, be it individually or collectively; all employees have equal access to membership regardless of an occupational group. Also, each

member has one vote irrespective of the allocation of any capital in the organization. Within a worker-owned cooperative, membership is open (and voluntary) to any member who meets the guidelines (often referring to active economic contribution and participation) set by the founding members of the cooperative (Cicognani et al., 2012). Upon taking membership in a worker-owned cooperative, members often share the ethical values of the cooperative founders, which include (a) honesty, (b) openness, (c) social responsibility, and (d) caring for others (Cicognani et al., 2012). The distribution of benefits or surplus per the cooperative's constitution guarantees all participating members of the worker-owned cooperative a percentage increase in salary (Paranque & Willmott, 2014); however, monetary profit is not the primary objective. Financial resources are customarily reinvested into the cooperative enterprise (Cicognani et al., 2012; Paranque & Willmott, 2014).

Structure of Ownership and Governance

Many worker-owned cooperatives adhere to the principles created by the Rochdale Pioneers and modifications made to the principles from Mondragon Cooperative Group and the International Cooperative Alliance regarding organizational governance (Cheney et al., 2014). Altman (2015) noted that the original principles stated (a) that capital should be of their providing and bear a fixed rate of interest, (b) only the purest provisions procurable should be supplied to the cooperative members, (c) market prices should be charged in conjunction with no credit given nor asked, (d) the principle of one member one vote should obtain in the governance of the cooperative no matter the sex/gender of the member, (e) the elected officials of the cooperative should carry out

management and managerial duties, and (f) the distribution of financial statements and balance sheets should be presented to members. Cheney et al. (2014), Redondo et al., (2011) posited that most worker-owned cooperatives allocate a set percentage of profits to their local community and implement standards that encourage environmental sustainability. Webb and Cheney (2014) mentioned that the level of investment at the start-up depends on the specific cooperative. Generally speaking, investment capital may consist of a variation of (a) worker shares, (b) nonvoting shares, or (c) reserves that are owned by the cooperative organization that are indivisible commonly owned (Webb & Cheney, 2014).

In addition to the principles mentioned above of cooperative organizational governance, the average worker-owned cooperative's democratic structure is established by the organization's by-laws and statutes (Cheney et al., 2014; Jussila, Byrne, & tuominen, 2012). Etxagibel et al., (2012) suggested that all voting members of the cooperative should keep an open mind about innovative techniques and practices of democratically organizing itself. Workplace democracy needs to be vigorously enforced with a high level of commitment and transparency from the employee-owners in creating a democratic process. (Avey et al., 2012; Etxagibel et al., 2012). Furthermore, Witherell et al., (2012) noted that more worker-owned cooperatives (incorporations of worker unions) are beginning to implement organizational structures, including succession planning and multistakeholder investment models.

When it comes to starting a worker-owned cooperative, The National Center for Employee Ownership (NCEO) stated that a cooperative could legally set up as a

corporation, partnership, or cooperative statute according to the state of incorporation (NCEO, 2016). Federal tax benefits are awarded to cooperatives no matter the form of creation (i.e., corporation or partnership) (Altman, 2015; NCEO, 2016). The start-up costs for worker-owned cooperatives are often less than direct ownership due to laws that make the process of incorporation less strenuous in the United States. Also, many states have professional organizations that specialize in providing low-cost services and support to individuals or groups interested in developing a worker-owned cooperative (NCEO, 2016; Paranque & Willmott, 2014). Webb and Cheney (2014) further explained that different classes of membership in a cooperative are impermissible in some jurisdictions. Additionally, the model organization determined and agreed upon by the board at the inception of the organization set an expectation of conformity to the principles and values of the cooperative among its worker-member-employee-owners community (Webb & Cheney, 2014).

The organizational structure of many established worker-owned cooperatives consists of an assembly of members relative to a traditional worker's union (Webb & Cheney, 2014). However, unlike unions, worker-member-employee-owners general assembly or membership meetings usually occur once a year to hold elections where members vote on the most critical problems as well as elect a governing council and board of directors (Paranque & Willmott, 2014; Thompson, 2015; Webb & Cheney, 2014). Internally, a worker-owned and governed cooperative and its network(s) operate within a corporate innovation system (Thompson, 2015), but overall, the cooperative adheres to the rules that stakeholders voted on.

The structures of ownership and governance set by the governing council and board of directors' outline in the organization's by-laws factors of operation for the company (Paranque & Willmott, 2014). Thompson (2015) and Paranque and Willmott (2014) posited that such structures within the operational culture are critical to facilitating practices within the cooperative environment. The governing council/board of directors' responsibilities includes hiring a general manager in which one of their responsibility is hiring the staff (Thompson, 2015; Webb & Cheney, 2014). It is not uncommon for employee-owners to be directly responsible for the governance of the cooperative, strategy planning, and operational decision making (Paranque, 2014).

A critical factor in the governance of a worker-owned cooperative is the engagement of the members (Webb & Cheney, 2014). In a worker-owned cooperative, ownership is associational, and psychological ownership can play an active part in intrinsic motivation (Borgström, 2013). Good governance is a worker-owned cooperative related to increased member performance (Hannan, 2014), democratic, and active member participation (Borgström, 2013; Negri Zamangni, 2012). Empirical evidence shows that good cooperative governance is connected to four capacities: (a) leadership, (b) stewardship, (c) management accountability, and (d) member accountability (Hannan, 2014). Therefore, organizational control and appropriation rights are given to all members equally (Sabantini & Modena, 2013).

Collective/Participatory Decision Making

Collective decision making and participatory decision making are both terms that fall under the umbrella of the concept known as participative management (Gilley et al.,

2015). Participative management is a management style that incorporates the input of employees and allows employees to provide resolutions to work-related challenges (Ahmad et al., 2014). Democratically, a participative management approach to decision making requires all members to think strategically while assuming responsibility for the outcomes of the decisions made and quality of work (Ahmad et al., 2015; Pardo-del-Val et al., 2012). Participatory leadership is highly noticeable within participative management based on the perspective and perceptions at the dyadic level (Lam et al., 2015). Lam et al. (2015) mentioned that the concept of participative leadership often requires leaders serving in managerial capacities to share or relinquish control over decision making.

The application of participative management within Western countries has gained popularity, and private and public organizations often use this management style to enhance organizational commitment and performance (Park et al., 2015). Additionally, participative management and leadership correlate to positive organizational factors such as employee empowerment and self-efficacy (Arbatani et al., 2016). Also, participative management and leadership within a worker-owned cooperative business model have shown a propensity to strengthen the traditional values of cooperative ideology (Battaglia et al., 2015).

As stated in the principles, member participation is a part of the organizational culture (Poulain-Rehm & Lepers, 2013). The ability to exercise one's decision-making power is evenly disturbed across employee-owners (Sabatini et al., 2014). Cooperative organizations utilize a workplace democratic voting system that allows each member one

vote in the decision making process (Arando et al., 2012). One benefit of participatory and collective decision making is the increase in procedural fairness that can lead to the development of trust (Dasgupta, 2012).

Polletta (2014) posited that participatory decision making within groups could increase the effectiveness and efficiency of the voting process. Collective and participatory decision making does not always translate to consensus decision making (Leach, 2016). An individual that is a voting member of the cooperative may reserve their right to block a decision that they deem objectionable (Leach, 2016). Nevertheless, collective democratic decision making provides an alternative logic that encourages cooperative employee-owners to take advantage of the opportunity to discover their views, whether in agreement with the majority or not (Rothschild, 2016).

Hoffman (2016) conducted a four-year study on multiple worker-owned cooperatives from various industries. Hoffman's results demonstrated how worker-owned cooperative employee-owners could enhance the equality of their workplace by minimizing hierarchy and creating the ability for employee-owners to express themselves freely and directly through a democratic process (Hoffman, 2016; Rothschild, 2016). This psychological impact influences democratic workplace behavior, and collective/participatory decision making gives employee-owners and managers the chance to shape social/organizational norms (Avey et al., 2012). Collective/participatory decision making encourages positive emotions through perceived support (Hoffman, 2016) and a higher correlation with goal attainment (Bindl et al., 2012).

Financial Participation

Employee financial participation has increasingly become the norm in employment relations (Poutsma et al., 2012). Unlike traditional shareholder corporations, worker-owned cooperatives are focused on the people and not necessarily on the capital gains of the organization (Jussila, 2013). Per the principles of the ICA, worker-owned cooperatives have established a commitment to building community wealth through sustainable developments in the community in which it operates via profit sharing (Nilsson et al., 2012; Stoll et al., 2015). In aligning with the cooperative principles reestablished by the International Cooperative Alliance, Ben-Ner and Ellman (2013) argued that employee-owners of a worker-owned cooperative could share control. Therefore, shared control can lead to sharing profits (Ben-Ner & Ellman, 2013). Also, Ben-Ner and Ellman provided four reasons why this is possible: (a) due to skewed rules, a group of people can form a coalition with enough control rights where a change in the profit-sharing rule(s) are implemented, (b) to combat the first reason, profit-sharing could be selected as a method to minimize coalition-building efforts; by decreasing this risk, profit sharing can stabilize and reduce conflict, (c) in adherence to the one-member-one-vote rule, wage compression may be valid under the acceptable conditions, and (d) low-producing employee-owners may find profit sharing as an incentive to increase work productivity.

Employee-owners can benefit from long-term rather than short-term investments (Tuominen et al., 2013). Long-term investing could result in (a) profit sharing is a safe method of accumulating capital while gaining independence, (b) to have a competitive

advantage, financial resources are necessary for development purposes, and (c) regional development is an essential aspect in the implementation of the cooperative purpose in the economic market (Tuominen et al., 2013). Various cooperative scholars have agreed that worker cooperative profit sharing is helpful with expanding the overall business entity (Syrjä et al., 2012). Profit-sharing is also vital to a cooperative when it creates a balance between members' short-term and long-term interests (Tuominen et al., 2013).

Organizational Identity and Identification

In this section of the literature review, I focus on some antecedents of organizational identity and identification. According to social identity conceptualization theorists, organizational identity is defined as the degree to which an individual is considered to be central, enduring, and distinctive of the organization (Albert & Whetten, 1985; Ashforth & Mael, 1989). Organizational identity promotes the following questions: (a) who are we, (b) how can we differentiate ourselves from others, and (c) what is most important to us (Kreiner et al., 2015)? Researchers in the organizational identity field have noted that the concept of organizational identity as a phenomenon correlates to competitive advantage and organizational change (Boehm et al., 2014).

Whereas organizational identification addresses the values with which an organization aligns, organizational identity focuses on critical interests shared by the organization's internal and external stakeholders (Henderson et al., 2015). Organizational identity is means of coping with the separations within society and a way for individuals to position themselves inside and apart from the cultural multitude. In addition, Pratt (2012) furthered examined the process of organizational identity and determined that

there are three bases of the organizational identity process, which are: (a) relational, (b) behavioral, and (c) symbolic. Researchers in the field should create chances to conduct research, expanding the process of organizational identity so future works can have a different scope of the phenomenon (Gioia & Patvardhan, 2012).

Within field literature, there is an evolving debate on whether organizational identity is a characteristic of organizational change or if it is, in fact, a process (Schultz et al., 2012). Traditionalists often think that the type of language used to characterize organizational identity is sufficient (Schultz et al., 2012). However, others that disagree with this notion argue that corporate identity prioritizes organizational activity above outcome and other associated antecedents (Krenier et al., 2015; Schultz et al., 2012). Many organizations in the 21st century, including alternative business models such as employee-owned and managed organizations, face rising complexity and significant change (Krenier et al., 2015). Therefore, using a multilateral definition of organizational identity can clarify the debate between characteristics versus process to members of modern-day organizations (Snihur, 2016).

Researchers like Krenier et al. (2015) recommended three terms that best define organizational identity, which is: (a) endurance of identity, (b) distinctiveness of identity, and (c) centrality of identity. Each of these components of the multilateral definition supports the processes and characteristics that constitute organizational identity (Rockwell, 2016). Additionally, many theorists agree that some form of organizational identity happens independently of individual organization members in the form of

emotions and other social constructs that are both objectively and subjectively viewed (Anteby & Molnar, 2012; Gioia et al., 2013).

The early work and research of Albert and Whetten (1985) on the conceptualization of organizational identity has shaped the modern-day interpretation of the phenomenon (Gioia et al., 2013). Based on the three terms of organizational identity, each qualifies as an organization's identities (Albert & Whetten, 1985). The trajectory of the concept of organizational identity and the multilateral definition of it portrays that the endurance characteristic of organizational identity is related to the stability or durability of each contributing component (i.e., individual and organization) over long periods (Gioia et al., 2013; Krenier et al., 2015). The distinctiveness of identity referrers to the distinguishing features of an organization that differentiates itself from others from the organizational member's perspectives (Krenier et al., 2015; Snihur, 2016). Lastly, identity centrality is associated with the organizational member's values about how common sharing beliefs generate an understanding of identity (Krenier et al., 2015; Rockwell, 2016).

Organizations that provide their members with a sense of identity tend to have passionate and devoted employees, including daily operational tasks and activities (Astakhova & Porter, 2015). Organizational members that identify with the organization are more likely to be fully engaged with all aspects of the organization (Cicognani et al., 2012; Gioia et al., 2013). Additionally, when organizations create positive identities, identity is a valuable strategy to position the organization to procure new ventures and resources (Snihur, 2016).

Employee identification with the organization is connected to the individual's sense of self and is less likely to contemplate or have any feelings related to leaving the organization (Tavares, van Knippenberg, & van Dick, 2015). Employee identification directly reflects how well an employee identifies with the organization or not (Cicognani et al., 2012; Tavares et al., 2015). Furthermore, organizational identity and identification are negatively associated with organizational turnover and turnover behavior (Tavares et al., 2015). Moreover, empirical evidence shows that the more an individual identifies with an organization is dependent on their level of attractiveness to the organization (Phillips et al., 2015).

Identity attractiveness can be defined as an individual's propensity to like, accept, and support their relationships within the organization they work for and centered on its qualities (Phillips et al., 2015). Another factor of identity attractiveness to consider is the organization's reputation (Su et al., 2016). For example, positive organizational reputation and identity attractiveness are linked with the prestige of an organization and self-distinctiveness (Su et al., 2016). When organizational identification is high, individuals can also make a fundamental distinction between themselves and the organization as a separate entity (Tavares et al., 2015). The reputation and the attractiveness, in turn, promote a healthy social exchange relationship between the organizational member and the organization (Snihur, 2016; Tavares et al., 2015).

Organizational Identification and P-O Fit

Organizational identity, identification, and passion for work are interrelated with an individual's satisfaction and suggest that the effects of these concepts in conjunction

with fit perceptions may increase the impact of performance (Astakhova & Porter, 2015). P-O fit theory concerning organizational identification explains that when an individual's values are aligned with the organization's value system, the individual needs are met (Greguras & Diefendorff, 2009). Also, organizational members that express work passion tend to have a higher P–O fit and recognize more opportunities to gain company-related bonuses (Astakhova & Porter, 2015).

Organizational identification is a type of organizational behavior that theoretically supports the employee's motion to strongly identify with the organization (Anaza, 2015; DeConinck et al., 2015). Researchers from managerial literature draw from the ASA framework to expound on organizational identification at the organizational level. Employees create relational partnerships to become comfortable to self-disclose and share closeness or intimacy (Anaza, 2015; DeConinck et al., 2015). Furthermore, there is empirical evidence that shows that individuals that are confident in their abilities, knowledge, and skills pre-entry into the organization will integrate more quickly into the work environment as well as develop a sense of organizational membership post organization entry (Anaza, 2015; Guan et al., 2013). P-O fit and organizational identification, contrary to high P-O fit, if low P-O fit and organizational identification exist, work passion is also low; therefore, values between the individual and the organization are usually not aligned (Astakhova & Porter, 2015).

Demand-ability Fit

Earlier in this literature review, I briefly discussed two dimensions of fit associated with the P-O fit paradigm. This study will focus on complementary fit as an

antecedent of organizational identification. Again, complementary fit happens when an individual or the organization offers attributes that the other needs (Sarac, Efil, & Eryilmaz, 2014). Demand-ability fit is described as the abilities and skills or self-efficacy that an individual has aligned with the organization's demands (Jiang & Gu, 2015; Sarac et al., 2014). The perception of abilities and identification to one's organization increase satisfaction (Ruiz-Palomino et al., 2013).

In conjunction with the perception of abilities and skills, competence plays a role in P-O fit and organizational identification. When an individual expresses fulfillment of competence, it will translate into an internalization of positive work outcomes such as commitment (Astakhova & Porter, 2015; Chung, 2015). The implications of high-quality relationships with individuals that show high demand-ability fit will motivate them to have more control over their work situations and increase outcomes such as trust, commitment, and respect (Tremblay et al., 2016). In contrast with high demand-ability fit, if the demand-ability fit is low among individuals and the organization, this may result in incompetence, unsatisfied feelings, and the quality of work outcomes will decrease (Astakhova & Porter, 2015). Also, when individuals display low demand-ability fit, this can lead to an individual engaging in negative organizational behavior that can ultimately damage the organization (Chung, 2015).

Need-supply Fit

P-O fit theory second dimension within a complementary fit is need-supply fit (Tremblay et al., 2016). Need-supply fit refers to the individual's or employee's needs meeting the organization's supplies (Marcus & Wagner, 2013). According to relevant

literature, the need-supply fit is interrelated to value-supply fit (Ruiz-Palomino et al., 2013). Value congruence is shared between the organization and the employee when requirements on both ends are met (Chung, 2015; Ruiz-Palomino et al., 2013). There are many likely forms of needs and supplies by both individuals and the organization (Astakhova & Porter, 2015). The perception of fit is centered on the specificity of what's offered (supplied) within the organization that addresses the precise need of the individual (Sarac et al., 2014).

Within a work environment, high needs-supply and P-O fit happen when work provides opportunities to the individual to pursue work goals that further the organization's greater good (Liu et al., 2015). Coinciding with Liu et al. (2015), individuals that exhibit evidence of organizational identification tend to work longer in the effort to support and promote work outcomes (Demir et al., 2015). Contrary to motivation and need-supplies met, if at any time an individual's needs are being met by the organization or if the organization is not supplying the individual need to succeed within the organization, this can result in low needs-supply fit (Astakhova & Porter, 2015; Demir et al., 2015; Liu et al., 2015).

Organizational Identification and Value Congruence

Congruence of values on the individual and organization levels can reflect a positive impact on either or both parties (Vveinhardy & Gulbovaite, 2016). Over the recent decade (2000-2012), researchers have increased their interest in the subject matter, which validates the importance of the subject to the field of business and management (Vveinhardt & Gulbovaite, 2014). Personal identification and value congruence are

significant factors in establishing identification on the individual level with the organization, including a positive attitude with the organization (Veinhardt & Gulbovaite, 2013).

The discussion towards value congruence often begins with the individual realizing the importance of their values in the work environment and the organization wanting the individual to comply with the values set by the organization (Michailova & Minbaeva, 2012). It is not unlikely that management may face the challenge of ensuring congruency on both the individual and organizational levels (Vveinhardt, Gulbovaite, & Streimikiene, 2016). Thus, to achieve individual and organizational value congruence, organizations must communicate, define, identify, and act consistently to the values throughout the entire organization (Vveinhardt et al., 2016).

Another way to view the concept of organizational identification and value congruence is values-based identification. Like organizational identification, values-based identification concentrates on the values trait of identification and the individual's idea of oneness with the organization (Smale et al., 2015; Zavyalova et al., 2016). Additionally, values-based identification showcases the compatibility within the individual-organization relationship and often the reason for an individual's decision to stay with the organization even though difficult times (Winter & Jackson, 2014). Individuals that display high levels of identification in respect of congruency of values emulate characteristics of the organization in which they work, and low levels of identification indicate that the individual lacks the connection between oneself and the organization (Zavyalova et al., 2016).

Organizational Commitment and Organizational Trust

Organizational commitment (OC) refers to an individual's psychological association with an organization (Choi et al., 2015; Saeed et al., 2014). In addressing this psychological association, Ng (2015) identified three influences of psychological attachments that connect an individual to an organization; these are (a) organizational trust, (b) organizational identification, and (c) organizational commitment. With individual and organizational outcomes, OC has important implications (Faisal & Al-Esmael, 2014). For example, job satisfaction (Duffy et al., 2015; Supeli & Creed, 2016), employee performance (Fu & Deshpande, 2014; Sani, 2013), and intention to quit/low turnover (Allen & Shanock, 2013; Islam et al., 2013).

In an organizational context, the word *trust* is associated with an individual's willingness and ability to show vulnerability to another party's behavior or actions within the organization based on the belief in positive future conduct (Lewicki et al., 1998; Mayer et al., 1995). Organizational trust, like organizational commitment, is multidimensional, and researchers have identified two facets of the concept (Ng, 2015). For example, Srivastava (2013) references multiple studies (i.e., McCauley & Kuhnet, 1992; Sitkin & Roth, 1993; Whitner et al., 1998) that identified the two facets of trust as lateral and vertical. Goh and Zhen-Jie (2014) reference studies (i.e., Maren et al., 1999; McAllister, 1995) that identified these two facets as cognitive and affective. The differentiation between lateral or vertical trust and cognitive or affective trust is the relationship between the employee and their co-worker's *lateral trust* versus the employee relationship with their supervisor and sheer management *trust* (Srivastava,

2013). The root of the connection (i.e., employee and co-worker or employee and supervisor) is based on *affective trust* or rationality *cognitive trust* (Goh & Zhen-Jie, 2014).

Concordantly, trust promotes intrinsic motivation in the employee on an individual level and increases the level of commitment in the individual employee to the organization (Srivastava, 2013). Intrinsic motivation is related to the propensity to influence trust between the individual employee and the organization to management contributions (Braun et al., 2013). Also, individuals with a higher risk of trusting others are keener to establish trustworthy relationships (Martin et al., 2015). Thus, organizational trust is a determinate of organizational commitment and can be used to show an individual's desire to be part of an organization and its culture (Swift & Hwang, 2013).

Organizational commitment and organizational trust are essential indicators of an organization's growth (Goh & Zhen-Jie, 2014), especially in a homogeneous workplace, such as a worker-owned cooperative (Harwiki, 2013). These two psychological attachments can have beneficial effects on the relationship in the cooperative (Biswas, 2015). For instance, observations of employee-owners behavior towards management have shown an increase in overall job satisfaction (Biswas, 2015). When members of a worker-owned cooperative show commitment, work behaviors such as social loafing decrease (Cechin et al., 2013). Also, interpersonal and interorganizational relationships between the individual and the organization increase long-term benefits and assures the cooperative's success (Pesämaa et al., 2013).

Three-Component Model of Commitment

The examination of multiple dimensions of commitment began with Meyers and Allen during the 1990s (Dawson et al., 2015). Their research needs to develop a model to explain the implications of commitment based on different mindsets on behavior (Nasomboon, 2014; Wallace et al., 2013). Organizational commitment focuses explicitly on exchanging with the organization and the individual employee (Ok & Vandenberghe, 2016). Therefore, these components identified as normative, affective, and continuance commitment are embedded in the mindsets of obligation, desire, and cost avoidance (Dawson et al., 2015; Panaccio et al., 2014). Additionally, based on the three-component model of commitment philosophy, the type of outcome desired will lead to the development of a different style of commitment and influence antecedents of behavior based on internalized views of the individual's actions (Bouckenooghe et al., 2015).

Antecedents of Normative Commitment

In essence, normative commitment is based on an individual's sense of obligation to the organization's norms and their allegiance to stay with the organization (Keiningham et al., 2015; Yucel et al., 2014). Various factors of normative commitment throughout scholarly literature conceptualize the activation of moral duty an employee may experience as a positive outcome of normative commitment (Barron & Chou, 2016). However, normative commitment has a weaker negative relationship with employee turnover and the intention to leave (Stanley et al., 2013).

The obligation aspect of normative commitment, Vandenberghe et al., (2015) argued that when normative commitment is analyzed theoretically using the self-

determination framework, normative commitment ought to evoke constraining obligations when few employment alternatives to commitment are present. When few other commitment options are moderators of normative commitment, an individual employee may feel indebted to remain loyal to the organization even when the perception of alternatives is few, resulting in external control (Vandenberghe et al., 2015). Furthermore, due to the salient external drive of few other options of commitment along with adhering to the philosophy of the self-determination framework, the link between the willingness to participate in behavior connected to the dedication and the strength to engage in such behavior is determined by how an internal drive influence an individual (Stanley et al., 2013).

Individuals with a solid normative commitment or a high level of normative commitment support the organization because of a sense of responsibility towards the organization (Bingham et al., 2013). Another explanation for high levels of normative commitment argues that individual employees with higher levels of normative commitment often connect emotionally with the organization they work for, creating a sense of obligation (Vella et al., 2013). However, when individuals show low levels of normative commitment, the feeling of responsibility and obligation to the organization is decreased, leading to greater intention to leave the organization (Davis et al., 2015).

More researchers have identified antecedents of normative commitment. For instance, Yucel et al. (2014) study results showed that high levels of normative commitment are shown in employees when transformational leadership styles are established. Also, Yamao and Sekiguchi (2015) revealed that when human resources

practices encourage the learning of a foreign language among organization employees, this aids in a positive impact on normative commitment. Mory et al., (2016) showed that an organization's internal corporate social responsibility affects individual employee's normative dedication.

Antecedents of Affective Commitment

Unlike normative commitment, the concept of affective commitment is the desire of the individual to remain loyal to the organization due to their emotional or psychological attachment to the organization based on shared objectives and values (Conklin et al., 2013; Wang et al., 2014). Scholars have identified characteristics of affective commitment, such as accepting organizational goals and leadership behaviors (Demirtas & Akdogan, 2015). Along with the individual employee's psychological attachment to the organization, individuals with high levels of affective commitment are less likely to leave the organization (Mignonac et al., 2015).

When an organization is developing systems that encourage affective organizational commitment, the organization needs to consider the design of jobs because it can influence how individuals connect with the organization (Casimir et al., 2014). For example, organizational autonomy has been linked to positive affective commitment (Drees & Heugens, 2013). Loyalty and work engagement are proven critical factors in increasing organizational productivity, dedication, and creativity (Ibrahim & Falasi, 2014). For any reason, the organization is experiencing challenging times. In that case, employees that have formed a positive emotional attachment and obligation to the

organization are keener to remain loyal to the organization despite difficult circumstances (Casimir et al., 2014).

Actions associated with affective commitment from the individual perspective are voluntary (Demirtas & Akdogan, 2015; Lam & Liu, 2013), and affective committed employees display higher levels of job satisfaction versus lower level affective determined individuals (Poon, 2013). Also, work outcomes such as high performance and low absenteeism are linked to an individual's desired commitment to the organization (Kehoe & Wright, 2013; Mercurio, 2015). Another antecedent related to affective commitment is job involvement (Scrima et al., 2014). Job involvement, work engagement, and affective organizational commitment are linked to positive work attachment (Scrima et al., 2014).

Many organizations utilize reward systems that promote intrinsic motivation to cultivate employees' desire for self-improvement and build self-efficacy as a means to encourage organizational support through affective commitment (Martin-Perez & Martin-Cruz, 2015). In addressing reward systems and affective commitment, reward systems encourage leaders in management to question what boosts and directs an employee's behavior (Martin-Perez & Martin-Cruz, 2015). The reciprocation of actions from the individual, based on their needs being satisfied by the organization, influence affective commitment through outcomes such as participatory decision making, job involvement, motivation, and lower intention to leave the organization (Martin-Perez & Martin-Cruz, 2015).

Antecedents of Continuance Commitment

Continuance commitment is understood as an individual's perceived cost associated with leaving the organization or when the individual feels there are no alternatives available (Chen et al., 2013; Devece et al., 2016). Unlike affective commitment, which inhabits emotional attachment to the organization, continuance commitment coincides with low emotional stability (Choi et al., 2015). Furthermore, aspects of continuance commitment should negatively be correlated with retention efforts due to the ideology that the cost to leave the organization outweighs the benefit of maintaining employment with the company (Anitha & Begum, 2016; Jaros & Culpepper, 2014).

Associated factors that influence continuance commitment include: (a) an individual's relationship with their co-workers, (b) an individual employee's tenure with the organization, and (c) the overall workplace environment. (Jaiswal & Dhar, 2016). Individuals who display high levels of continuance commitment maintain their employment or membership with the organization due to their need for the organization and their feelings for the organization (Tarigan & Ariani, 2015). Then again, when continuance commitment is matched with high levels of affective and normative commitment, continuance commitment enables the employee to become aware of the associated costs of losing work (Kam et al., 2016).

Practitioners and researchers specializing in commitment profiling suggest that organizations should be selective when hiring individuals with continuance commitment dominant profiles because of the unfortunate outcomes (i.e., intention to stay) related to

the continuance commitment profile (Kam et al., 2016). In conjunction with poor organizational work outcomes, continuance commitment has been connected with the nontransferability of education and skills and the incapability of finding employment alternatives (Yamao & Sekiguchi, 2015). However, the factors related to continuance commitment are situational and subject to change depending on the relationship between the individual employee and organizational commitment; the commitment construct can contribute to changes in one or more of the commitment mindsets (Kam et al., 2016).

Despite the negative reputation associated with continuance commitment, researchers related to continuance commitment have positively correlated this dimension of organizational commitment with an external locus of control (Segrest, Andrews et al., 2015; Vandenberghe & Panaccio, 2015). Individuals with a high tendency of external locus of control believe that rewards are based on probability, fate, or other external factors outside of one's control (Segrest et al., 2015). Also, research has examined the link between continuance commitment and psychological empowerment as an alternative motivator behind continuance commitment (Kim & Beehr, 2016; Vandenberghe & Panaccio, 2015). Furthermore, researchers have shown that psychological empowerment and self-determination can improve an individual employee's motivation and continuance commitment (Farzaneh et al., 2014; Vandenberghe & Panaccio, 2015).

Other antecedents of continuance commitment include financial and social costs (Dawson et al., 2015). Using the provided explanation of the three component model of commitment, I will focus on affective and normative commitment in worker-owned cooperatives in this study. Both dimensions of organizational commitment can benefit

cooperative managers by placing value on variables and antecedents related to affective and normative commitment (Jussila et al., 2014).

Member Commitment Versus Organizational Commitment

As stated previously, organizational commitment is defined as an individual's psychological attachment to the organization (Albdour & Altarawneh, 2014). The construct of member commitment is defined as the individual's attitude and behavior towards the organization (Cechin et al., 2013). The differentiating factor that distinguishes member commitment from organizational commitment is the extent to which worker-owned cooperatives adjust their organizational attributes resulting in restructured models (Benos et al., 2015). Therefore, member commitment is evaluated on how well a cooperative can separate itself from an investor-owned firm (Jussila et al., 2014).

Member Commitment in Worker-Owned Cooperatives

Members of a worker-owned cooperative assume the responsibilities associated with the dual nature of which the cooperative organization was created (Puusa et al., 2016). The dual roles of an employee-owned cooperative are based on a business enterprise and member community roles (Puusa et al., 2016). The complexity of a cooperative business structure is described in a manner that the employee-owner has dual roles as the patron and an owner (Puusa et al., 2013). The primary purpose of a worker-owned cooperative is to boost the returns to the members of the cooperatives and the operations of the enterprise (Puusa et al., 2016).

Researchers have suggested a link between member commitment and member patronage (Wollni & Fischer, 2015). Other studies have focused on examining member commitment using concepts to measure member's attitudes towards the cooperative in which they hold membership (Hernández-Espallardo et al., 2013). In addition, the determining behavior that coincides with commitment has been examined in studies (Pascucci et al., 2012). In conjunction with these studies, researchers have conceptualized commitment as the individual member's attachment to the cooperative organization; however, it may or may not be linked to its commitment behavior (Cechin et al., 2013).

Alongside commitment behavior, positive inter-organizational relationships can ensure the stability and maturity of the connection between the organization and the employee-owner (Pesämaa et al., 2013). Member commitment as a work outcome is affected by how the relationship between the cooperative organization and the individual employee-owner is governed (Bijman et al., 2013). Another factor contributing to increased member commitment within the worker-owned cooperative environment is cognitive heterogeneity, which can be defined as an individual's conception, interpretation, and perception of the world (Aggarwl &Williams Wooley, 2013; Bijman et al., 2013). There is evidence within field literature regarding a connection between cognitive heterogeneity and work outcomes, such as increased performance, job satisfaction, and increased commitment (Kim & Rasheed, 2014). Also, the positive benefits and consequences of cognitive heterogeneity can symbolically impact management and overall decision-making processes within the organization (Blanco-Oliver et al., 2016). However, within a worker-owned cooperative, managers can also be

members, and cooperative managers do not necessarily have an adversarial relationship with employee-owners of the cooperative (Zivkovic et al., 2016).

Empirical research related to member commitment and worker-owned cooperatives is scarce; however, the conceptualization of member commitment in worker cooperatives is contributed to the efficacy of the employee-owners affective commitment to the organization (Biswas, 2015). Member commitment is subjective based on the effective decision-making processes adopted by the leaders of the cooperative organization (Biswas, 2015). The imperativeness of effective leadership and its role in contributing to a loyal membership base correlates with transparency from the organization leaders and the employee-owners (Biswas, 2015).

As stated previously in this literature review, trust is an antecedent of commitment (Kontogeorgos et al., 2014). Researchers of cooperatives in Europe show that demographic factors such as age, socio-economic background, and experience can be linked to employee-owners commitment and trust towards management (Kontogeorgos et al. 2014). Other research on cooperative member commitment suggested that proper cooperative education can increase employee-owners commitment to the organization (Kinyuira, 2017). According to cooperative principles, cooperative education is a requirement for employee-owners to effectively participate in decision-making processes and learn sufficient information to address cooperative matters (Witte, 2014). Additionally, many researchers believe that a lack of proper cooperative education can lead to a lack of member commitment and disloyalty, low productivity, and low member participation among employee-owners (Kinyuira, 2017).

Challenges and Critiques of Worker-Owned Cooperatives

Since the conception of the alternative business structure, cooperative enterprises include opposing views arguing that the business model is weak because of the lack of face-full owners (Borgström, 2013). Also, many worker-owned cooperatives have found it challenging to stay competitive in capitalist settings without abandoning their founding principles and essential nature (Parker et al., 2014). Internationalization and globalization are factors to consider in the debate of the competitiveness of worker cooperatives (Bretos & Errasti, 2017). Researchers have posited that cooperative enterprises are a paradoxical structure compared to investor-operated firms (Cathcart, 2013).

Noting the challenges worker-owned cooperatives face, Cheney et al. (2014) described five significant organizational and managerial problems cooperatives experience: (a) the need for more research that explores the resources, structures, and practices that contribute to the toughness of worker-owned cooperatives, (b) the continuous changing roles of leadership within the cooperative such as charismatic, ethical, and collaborative leadership, (c) learning how to reinvent employee-owner participation and democratic values, (d) strengthening relationships between cooperatives, labor, government, the community in which they operate, and increased global competition, and (e) staying true to cooperative values and policies within a competitive international market. Additionally, transferability is a significant challenge that employee-owners face as being members of a worker-owned cooperative (Borgström, 2013). For example, the cooperative stock and membership value are mainly based on the transactions that take place within the cooperative (Borgström, 2013). Non

transferability can result in the cooperative's inability to effectively and highly perform due to a deficiency to effectively separate the stakeholders from participating in organizational governance (Taylor, 2015).

Coinciding with the ICA cooperative principle of education, another challenge that worker-owned cooperatives face, especially in the United States, is the lack of education of the alternative business model in management curriculum (Audebrand et al., 2017). Based on research conducted since 2012, implementing alternative business models, particularly worker-owned cooperatives in popular management curricula and literature, can increase pedagogic value in management education. Pedagogic value improves student and potential employee-owner paradoxical thinking skills (Audebrand et al., 2017). Also, cooperative culture in the United States is not widely known, and this challenge can impede the expansion of the alternative business model (Flecha & Ngai, 2014). Lack of cooperative culture can directly relate to non transferability and prevents cooperatives from expanding in different markets (Flecha &Ngai, 2014).

Research Approaches to Problem

In this literature review, I focus on literature that discusses the history of worker-owned cooperatives and the connection between the organization and the individual in relation to organizational value. Based on my exhaustive search of related literature, most field literature concerning worker-owned cooperatives was economically related. Only a tiny portion of the literature addressed the research problem from a managerial perspective. This gap in research literature justifies the purpose of my study. Others view self-owned, self-ran, and self-managed organizations as a social enterprise that is

disadvantaged due to its organizational form, the scale of operation, and management structure (Lim et al., 2015). Despite opposing views on cooperative enterprises and worker-owned cooperatives, research shows that the fundamental role of worker-owned cooperatives is implementing values-based learning within the organization structure from conception (Hartley, 2014).

Theorists in qualitative research literature have focused on identifying outcomes related to organizational value revealed identification on the individual level develops when members of an organization differ in the importance of organizational values (Besharov, 2014). Researchers emphasize that identifying and de-identifying individuals of an organization show de-identification related to work outcomes such as decreased organizational performance (Anteby & Wrzesniewski, 2014). Other qualitative researchers ethnographically explored tension dynamics and how it has managed in a cooperative between the individual and the organization. Their results indicated that value is recognized from both sides (Ashforth & Reingen, 2014). However, on the individual level, members choose which part of the mission values they most identified with and projected the less favorite factors of the mission onto other organizational members (Ashforth & Reingen, 2014).

In selecting a case study as the methodological research approach for this study, I considered other qualitative research methodological approaches such as grounded theory, narrative, and phenomenology. Using a grounded theory research approach, researchers tend to conduct inductive, constructivist reasoning analyses of theory literature (Khan, 2014). Also, the literature review and research questions promoted

conceptual thinking and theory rather than empirical testing of the idea (Khan, 2014; Punch, 2014). This generalized methodological research approach would explain the phenomenon in a specific context (Cho & Lee, 2014).

A narrative methodological research approach would allow me to explore the personal conflict and resistance of the study participant (Wolgemuth, 2014). This approach would enable me to story tell the phenomenon from a unique perspective. Narrative research inquiry can advance the social change agenda (Denzin & Lincoln, 2013). However, concerns relating to the trustworthiness and validity of the narrative research approach within the qualitative field need further discussion so the methodological approach can become more accepted (Loh, 2013). For my research study, I am interested in exploring a group; therefore, a narrative method does not fit the focus of the study.

Phenomenological research incorporates descriptive and interpretive meanings of the lived experiences of the participants (Chan et al., 2013; Sloan & Bowe, 2014). Phenomenology researchers aim to describe the essence of the phenomenon through intuition and the process of variation (Gill, 2014). The phenomenology method could be applied to this research study, but it is not my intention to describe the essence of the culture being studied.

As mentioned previously in the research proposal, this study aims to explore the mismatch between the organization and the individual in relation to organizational value. The perceived organizational fit and value congruence addresses the effect of organizational identification and work outcomes such as member commitment among

employee-owners of a worker-owned cooperative. Using a qualitative case study along with semistructured interviews, reflective journaling, and archival material presents the advantage of allowing me as the researcher access to a varied range of participants' perspectives in a short time (Cicognani et al., 2012).

If I selected to use quantitative research methodology as the research design of choice, this would have enabled me to investigate the perceived value of a worker-owned cooperative by its employee-owners and the predictors of member commitment statistically (Cicognani et al., 2012). The quantitative methodology focuses on answering the research question from an explanatory viewpoint to measure assumptions (Yilmaz, 2013). With sampling, quantitative research methods usually require a large sample size (Choy, 2014), and my research aims to concentrate on a small employee-owned enterprise. Furthermore, within the framework of the quantitative methods, researchers are typically constricted to using standardized instruments that often allow the study participant's perspectives to pre-determinedly fit into particular response categories (Yilmaz, 2013).

Summary and Transition

Commitment within a worker-owned cooperative business model is credited for creating a sense of community and solidarity in its organizations (Kennelly & Odekon, 2016). Despite critics asserting that cooperative enterprises only thrived in an economic downturn (Abell, 2014; Palmer, 2014), employee-owned and operated firms are experiencing growth in the United States (Meyers & Vallas, 2015). Overall, my literature review on this subject matter justifies this alternative business model's legitimacy as a

form of enterprise. However, worker-owned cooperatives (specifically in the United States) face many challenges that have hindered future development (Kennelly & Odekon, 2016).

In this literature review, I illuminated the importance of fit theory and value congruence in work outcomes such as commitment. Ironically, worker-owned cooperatives are still underrepresented and neglected in the research literature (Leca, Gond, Cruz, 2014). Experts agree that the exploration of worker-owned cooperatives in management studies can better prepare students and individuals developing and working in these organizations to meet social and economic challenges and the ability to influence active practices while contributing to positive social change (Cheney et al., 2013).

This literature review found a mixture of qualitative and quantitative research about worker-owned cooperatives, commitment, and value congruence. However, I located just one research article that was most relatable to my research topic. Also, other themes I assessed in this review are organizational identity, organizational identification, organizational trust, demand and supply fit with P-O fit theory, and value congruence on the individual and organizational level. Based on this literature review, I provided an ample amount of empirical evidence to support my decision and rationale to conduct this research. My aim for this research is to contribute to the steadily growing body of knowledge on the alternative business model in the form of worker-owned cooperatives.

In Chapter 3, I will discuss in detail the methodology design choice for this study. Additionally, in Chapter 3, I will cover population, focus group interviewing as the primary data collection method, trustworthiness, and the researcher's role.

Chapter 3: Research Method

The purpose of this qualitative case study was to explore the mismatch in organizational value between an individual who works for a worker-owned cooperative and the organization. In this chapter, I discuss the research design, the role of the researcher, methodology, instrumentation used for data collection, data analysis procedures, and issues with trustworthiness.

Research Design and Rationale

Qualitative research requires researchers to collect data using different collection methods than researchers use for quantitative research (Anyan, 2013). Qualitative inquiry refers to the methodological scientific procedure in which a researcher gains knowledge on the nature of experiences and actions of an observed phenomenon (Fine, 2013). In the qualitative paradigm, researchers tend to incorporate frequentative processes in which the data are analyzed while producing original knowledge from the results (Osbeck, 2014). As such, the procedures used to describe and document qualitative research should be transparent so that other researchers can review and understand (Yin, 2015).

With the qualitative paradigm, there are many approaches to conduct analysis (Singh, 2014). Depending on a researcher's objective, one can select a more focused approach to the phenomenon under qualitative inquiry (Percy et al., 2015). Such strategies include case study, ethnography, grounded theory, narrative inquiry, and phenomenological research (Flick, 2014; Marshall & Rossman, 2016; Ritchie et al., 2013). In this study, I used a case study for the research approach.

A case study approach is the most used in qualitative inquiry (Yazan, 2015). A case study is defined as an in-depth investigation using multiple methods and sources of data to examine a phenomenon within a real-life context (DeMassis & Kotlar, 2014; Percy et al., 2015; Vohra, 2014). Researchers using a case study approach collect data by (a) field observations, (b) interviews, (c) records, or (d) document review (Pacho, 2015). Case studies are characterized as a unit of analysis and not a topic of investigation (Merriam & Tidell, 2016). Therefore, the unit of analysis is the differentiating factor of whether a study can be classified as a legitimate case study versus other qualitative research approaches (Merriam & Tidell, 2016).

Case studies are used in management research to describe phenomena ranging from the detailed, nuanced, inductive, interpretive, and indicative analysis designed to build theory (Le & Schmid, 2012). Thus, case study findings are contingent upon influences on values from the perspectives of the researchers and other study participants (Ridder et al., 2014). Traditionally, case study research is rooted in positivist assumptions (Yin, 2009). In a positivist lens case, researchers can build theory using an exploratory perspective (Ridder et al., 2014). Scholars have debated whether theoretical frameworks should be omitted from qualitative case study research (Wrona & Gunnesch, 2016). Inductive epistemological reasoning includes theory in case study research because researchers can observe, describe, and understand the phenomenon from different viewpoints. Theory-based analysis also enables researchers to explain their assumptions (Lin, 1998) substantively.

The design choice for this research study was a case study. My rationale for selecting this specific research design and approach was that a case study would assist me in exploring the overarching research question in depth. A qualitative research method design is structured to understand the phenomenon in question from different worldviews (Blenker et al., 2014). As such, debates surround the strengths and weaknesses of qualitative data analysis (Faisol & Chowdhury, 2015). For example, researchers have criticized qualitative research for lacking the ability to generalize the results in hopes of applying to broader populations (Gordon & Patterson, 2013). Notwithstanding, one of the strengths of qualitative inquiry is a researcher's ability to collect data through interviews, observation, and reviewing texts and documents to understand better the participants' stories within the phenomenon (Mason, 2013). Unlike qualitative research design, quantitative analysis allows a researcher to generalize findings; however, this data collection method does not allow a researcher to provide insight into participants' individual experiences and perspectives (Yilmaz, 2013).

Role of the Researcher

In using a qualitative case study, a researcher can draw from an array of sources of information—(a) direct observation, (b) interviews, (c) archives, (d) documents, and (e) survey data—to develop sources to integrate theory (Bazeley, 2016). Critics note the increased possibility of selection bias within a case study method based on a researcher's prior knowledge of the case, leading to favoritism that can impact the case (George & Bennett, 2005). However, incorporating various methodological provisions in the research procedure can protect a study from researcher bias (Starman, 2013). Conditions

can include (a) having a consistent tracking process, (b) having a detailed and accurate description of the data collection procedure, and (c) documenting everything to achieve reliability (Starman, 2013).

In qualitative research, a researcher is typically the primary instrument and their presence or interaction with the study participants is essential to the research methodology (Marshall & Rossman, 2006). Qualitative researchers are responsible for creating equilibrium between ethics and curiosity while endeavoring not to cause harm to study participants (Chatfield et al., 2014). The research calls for the researcher to become self-aware about their impact on research study participants (Chatfield et al., 2014).

In a qualitative interview, a researcher can gather detailed and in-depth information about study participants' perspectives and experiences on a particular topic (Turner, 2010). Using virtual semistructured one-on-one interviews and being the primary data collecting instrument, this data collection method can give better insight into the topic of the research study due to more personal access to data (Dikko, 2016). Semistructured interviews were conducted with 15 study participants via computer communication software. The interviews followed an outlined set of questions (Yin, 2003) and combined structured and unstructured interviewing formats (Dikko, 2016; Robson, 2002).

Subjectivity can be perceived as bias and can be viewed as a threat to a study based on a researcher's expressions of ideology or sympathy toward the studied culture (Roulston & Shelton, 2015). As the researcher and data collection instrument, it was my responsibility to mitigate subjectivity and bias. Using reflection methods, such as

journaling, can provide breadth and depth to the data collection and analysis processes and aid in controlling bias (Kennedy-Lewis, 2012).

A phenomenon that occurs during the data collection phase that is directly related to the role of the researcher is the natural development of relationships and the shifts of power dynamics between a researcher and the participants (Anyan, 2013; Giampietro, 2011). Thus, the relationship between the researcher and the participants may become asymmetrical or exploitative (Cunliffe & Karunanayake, 2013). In the effort to remain in control and to protect the research participants, a researcher must engage in reflective behaviors such as probing so they are aware of how their presence can influence or change participants' practices and perspectives (Wagle & Cantaffa, 2008).

For this study, my role as researcher and data collection instrument incorporated virtual semistructured one-on-one interviews with study participants using open-ended questions. This method of interviewing gives a researcher flexibility in each interview to gain optimal information from study participants (Dikko, 2016). Additionally, in my role of researcher, the semistructured virtual one-on-one interviewing method provided an opportunity for me to discover what is known about the concepts in question from the study participants' points of view (Chenail, 2011).

Methodology

Participant Selection Logic

To select participants, I used a purposive sampling method. Purposive sampling incorporates steps that emphasize data saturation by obtaining a complete understanding that can include continuous sampling until no new practical data are learned (Etikan et

al., 2016). Purposive sampling is a researcher's deliberate decision to select participants due to their specific qualifications such as knowledge and experience with the phenomenon (Barratt et al., 2014; Etikan et al., 2016). In this study, I undertook a homogeneous sampling technique. Homogeneous sampling not only involves having small sample sizes, but also selecting participants who have specific characteristics that grant an adequate representation of sociodemographic and job-related compatibilities (McKenzie et al., 2016).

In this research study, I aimed to explore the mismatch in organizational value between the organization and the individual in a worker-owned cooperative; however, the one organizational aspect that the participants are homogeneous in is their belief in the cooperative principles set by ICA. Using homogeneity in purposive sampling has its advantages and disadvantages (Bornstein et al., 2013). For instance, researchers who use homogeneous purposive sampling usually have a lower cost in recruitment. In contrast, a disadvantage with this sampling approach is the risk of not yielding generalizable results that may benefit other populations (Bornstein et al., 2013).

Gathering data from employee–owners and managerial members from multiple worker-owned cooperatives made up the potential study participant group. Including managerial personnel, perspectives can give more legitimacy to embody a true organizational identity (Narvaiza et al., 2017). Determining the appropriate sample size for a qualitative study may include an array of factors. Scholars and researchers have not agreed on a precise number regarding what constitutes a sufficient qualitative sample size (Mason, 2010).

For example, Bernard (2000) suggested that 30–60 participants is an acceptable sample size for a qualitative study. Bertaux (1981) and Guest et al. (2006) both suggested that 15 is the minimum number of participants any qualitative research study should include. Based on the information provided regarding population sample sizing, I used the suggestion by Bertaux and Guest et al. with a sample consisting of 15 participants. The 15 study participants came from multiple worker-owned cooperatives in the United States. To strengthen triangulation and increase the depth of potential data, using various organizations to identify and obtain participants is more realistic than using one specific organization.

Due to the nature of many worker-owned cooperatives, employee–owners are often in a peculiar position because of the multiple roles many assume (Ashforth & Reingen, 2014). A qualitative case study approach enabled me as the researcher to explore the perspectives of the key stakeholder group, which are the active employee–owners of the cooperative. The criteria for selecting employee–owner participants within the cooperative were based on individuals' activity in the organization's governance and managerial process. Selection criteria for this study differentiated individuals who never or hardly participate in worker-owned cooperative governance and managerial processes (Ashforth & Reingen, 2014). Employment and membership requirements vary based on the governing constitution of each worker-owned cooperative (Pérotin, 2016). All employee categories can become cooperative members, and many employees of worker-owned cooperatives do (Pérotin, 2016).

Another selection criteria was that the worker-owned cooperative organization had been open for business and operation for at least 3 years. The number of documented worker-owned cooperatives in the United States is fewer than traditional corporation organization counterparts, translating to a small workforce (Kennelly & Odekon, 2016). In the effort to identify a worker-owned cooperative in the United States, I contacted the U.S. Federation of Worker Cooperatives (USFWC) through an expression of interest email that outlined the specifics of my research study and inquired about gaining access to their general member directory. Additionally, I contacted the Center for Community Based Enterprise (C2BE), through the same means as USFWC to acquire access to the member database. C2BE is a nonprofit organization that provides legal, technical, and educational aid to developing and established worker-owned cooperatives. After receiving worker-owned cooperative listings from both sources, I sent a different expression of interest letter to the worker-owned cooperatives who met study-specific criteria. Once I identified worker-owned cooperatives who met all study criteria, I contacted the employees via email addresses provided by the worker-owned cooperative.

Sample sizes and the ascertaining of sample sizes differ in qualitative and quantitative inquiry (Mason, 2010). However, the fundamental concept for sample size in qualitative research is data saturation (Fusch & Ness, 2015; Malterud et la., 2015). Saturation is the standard in qualitative studies for verifying sample size (Fusch & Ness, 2015; Morse, 2015). One idea about data saturation is that the results are usually generalizable when a researcher has achieved data saturation (Boddy, 2016). In conjunction with small sample sizes associated with qualitative research, elements that

contribute to the saturation of data include the richness or quality of the data, sample strategy, the breadth of the research questions, and data collection method (Fusch & Ness, 2015; Moser & Korstjens, 2017).

Instrumentation

Qualitative methodology is known to embrace the researcher as the data collection instrument (Bourke, 2014). The propensity for bias increases when a human instrument collects data (Peredaryenko & Krauss, 2013). Subjectivity is directly related to the researcher being the research instrument, and two concepts come into play: (a) the ability of the researcher to convey the experiences of the participants and oneself, and (b) how the study participants understand and interpret their experiences (Bourke, 2014). As a result, it is the researcher's responsibility to be aware of their biases and develop strategies to mitigate their bias (Radley & Chamberlain, 2012).

For this study, virtual semistructured one-on-one interviews with study participants via video interviewing using computer communication Software (Skype) were the primary data collection instruments. Construct validity will be established using triangulation from various sources (Yin, 2003). Study evidence built from collecting data from press items, each cooperative's website. Detailed video interviews via computer-mediated communication software (Skype) with at least one managerial member and employee-owners from multiple worker-owned cooperatives. I also used the examination of archival material and reflective journaling. Using various data collection instruments, including member checking, provided the researcher with the best chance of gaining an accurate view of the experiences of the study participants (Bourke, 2014).

Semistructured Interviews

Semi-structured interviews are designed to generate subjective responses from the participants regarding a particular situation or phenomenon they have experience (McIntosh & Morse, 2015). Semi-structured interviews use a combination of structured and unstructured interviewing techniques within the qualitative paradigm (Campbell et al., 2013; Dikko, 2016). When using this interviewing technique, the interview questions are open-ended and prepared beforehand. However, this interview-style allows for the interviewer to implement improvisation (Meyers & Newman, 2007). This technique gives the researcher versatility and flexibility, and the rigidity of the structure varies on the purpose of the research questions (Kallio et al., 2016).

Researchers can collect data from semi-structured interviews that cannot be gathered from other forms of data collection such as questionnaires or participant observations (McIntosh & Morse, 2015). In diversifying the type of semi-structured interview, a researcher uses the data collection phase during the study's data collection phase depending on the typology, purpose, epistemological viewpoint, role of the participants, and outcome of the research (McIntosh & Morse, 2015). One advantage of using semi-structured interviews is that it enables reciprocity between the interviewer and the study participant (Galletta 2012). Also, the interviewer has the flexibility to ad-lib follow-up questions based on the study participant responses to the interview questions (Rubin & Rubin, 2005). Another advantage of semi-structured interviews is that the interviewer can rearrange the interview questions depending on the direction of the discussion (Doody & Noonan, 2013).

A disadvantage associated with semi-structured interviewing is the concern about internal validity. Interviews conducted using the semi-structured method and data collected from interviews may not reflect reality (Alvesson, 2003). Consequently, the internal validity of data collected from the interviews can be seen as informational statements describing observations and experiences (Winter, 2000). Another disadvantage is that first-time researchers may have difficulty with question placement or further exploring participants' responses, resulting in significant data not collected (Sharp & Randhawa, 2017). If the researcher does not contain all pertinent data and information for the interviews, a study's validity is weakened (Doody & Noonan, 2013).

Video Interviews

Video interviewing is a form of computer-mediated communication (Mann, 2016) that allows interviewers to conduct interviews online (Mann & Stewart, 2000). This method of interviewing is increasing due to its convenience for both the interviewer and interviewee. Video interviews increase the possibility to interview participants that might otherwise be difficult to interview (Mann & Stewart, 2000). Video interviewing as a method of qualitative data collection is a growing opportunity for researchers to gain access to study participants across geographical dispersed distances and time zones as well as conducting interviews from one's own space (Deakin, & Wakefield, 2014; Hammond & Wellington, 2013; Hanna, 2012). Video interviews mimic face-to-face interactions (Seitz, 2016) and may provide study participants with more opportunities with their reflective responses to interview questions (Hammond & Wellington, 2013).

Researchers can utilize Skype to conduct one-on-one interviews, small focus group interviews, and much more (Janghorban et al., 2014). Semi-structured one-on-one interviews can be performed synchronously in real-time or asynchronously (Janghorban et al., 2104). Synchronous discussions utilize text-based chat rooms, instant messenger, and videoconferencing (Stewart & Williams, 2005). In contrast, asynchronous interviews use emails, bulletin boards, and discussion groups to collect data (Hooley et al., 2012). For this study, Skype was the preferred computer communication software of choice. Study participants' interviews were completed synchronously via videoconferencing.

Skype is a free computer software service that enables the communication between parties using video via webcam using a desktop or laptop computer, smartphone, or tablet (Seitz, 2016). Some of the advantages of using Skype are that participants may be more willing to disclose their perspectives (Irvine et al., 2013). It saves money and travel time and increases the participant population in terms of geographical access. It allows the researcher and the interviewees to participate in the interview from the comfort of their own spaces (Lacono et al., 2016). Despite using Skype, disadvantages when using the software are the loss of physical cues between the researcher and the participant (Sipes, et al., 2019). Technical issues such as weak Wi-Fi signal (AlKateeb, 2018), dropped calls, pauses, and lack of visual cues (Quaritiroli et al., 2017), and lack of program familiarity (Hamilton, 2014).

Ethical Concerns

When conducting video interviews for qualitative research, both study participants and the researcher must consider ethical risks (Siper et al., 2019). One risk

associated with video interviewing is the differentiation between private and public spaces (Redlich-Amirav & Higginbottom, 2014). Internet video interviews have variations of perceived privacy determined by the participants or the researcher (Sipe et al., 2019; Walker, 2013). An environment assessment before starting the interview can positively impact any information collected from the interview (Hana, 2012). Data privacy protection is another ethical risk associated with video interviews (Deakin & Wakefield, 2014). In the effort to mitigate challenges and risks associated with the use of video interview as the primary means of communication, I followed the Skype Preparation Checklist by Sipes et al. (Appendix F) and instructions on how to download the computer communication software (Appendix G) for PC, Mac, IOS (iPhone), and Android operating systems.

Interview Protocol

For this study, the overarching research question was used as the primary source to identify and yield specific information needed in furthering my understanding of the phenomenon. Eleven interview questions are formulated as open-ended questions to encourage participants to engage in dialogue and share their stories to be represented in the data (Bourke, 2014). Follow-up questions were based on gaining clarification on statements made by study participants. I selected a semi-structured interview format for all the interviews for two reasons. Using semi-structured interviews allowed me to assess and become familiar with the patterns and themes from the organizational culture and unveil some hidden knowledge between processes (Paine, 2015). The second reason was semi-structured interviews create a neutral setting of familiarity (Araujo, 2007).

Each interview consisted of an interview protocol of welcoming the participant, reiterating the study's purpose and context, and introductions. Additional interview protocol includes: reviewing the consent form to ensure that participant understands that all information gathered from the interviews is confidential, set-up of the computer communication software, proceeding with interview questions, and follow-up questions which incorporated member checking. The primary purpose of member checking is to ensure that the researcher accurately communicates what the study participants said or did not say during the interview process (Harper & Cole, 2012; Simpson & Quigley, 2016). The conclusion of the interview process consisted of me extending an expression of appreciation to the participants.

Reflective Journaling

Reflective practices are known in the social sciences as improving professional forms of practice that generate learning conditions for researchers and practitioners to become proficient in their field (Rosin, 2015). Using reflective journaling, I engaged in self-reflective practices that helped me become more self-aware and assisted me in developing a more profound understanding of the research experience, as discussed by Nisbet (2012) and Norberg (2014). In using the technique of reflective journaling, I enabled myself to record my personal feelings and experiences from the study via writing to aid in identifying any biases that may affect the interpretation of the collected data. A benefit of using a reflective journal is that it is helpful to researchers that conduct case study research (Fusch et al., 2017; Sangasubana, 2011). In conjunction with writing down the interpretations from the data collection process, reflective journaling also supports

capturing any informal conversations and observations made while on-site (Corcoran & Duane, 2017).

In qualitative research, there are two types of reflective journaling that researchers can use: (a) personal journaling and (b) data collection journaling (Snowden, 2015). The first type of journaling describes allowing the researcher to chronologically record their research experience from start to completion while adding scope to the study (Robson & McCartan, 2016). The second type of reflective journaling is known for enhancing the rigor of qualitative research by documenting the researcher's thought processes (Snowden, 2015). Aligning with these two types of reflective journaling, Dickson (2017) suggested that using the method of freewriting (i.e., freely exploring questions, bias, and expectations) is acceptable for early career researchers.

For this study, I engaged in a personal reflective journaling style. This journaling process allowed me to write my personal feelings, thoughts, and experiences in note form from the time my research proposal is confirmed to complete the study. I followed Lamb's (2013) description for personal reflective journaling in creating the reflective journaling process structure. This process includes dividing each journal page into four sections. Section one of the journal showed what went well, section two showed what did not go well, section three recorded lessons learned, and section four was substantiated evidence made in section four previous areas.

This research study included researcher-developed instruments. Potentially, the data collection and analysis process can threaten the study's validity (Denzin & Lincoln, 2011). The method of instrument development, the literature review contents such as the

organizational breakdown of what a worker-owned cooperative is, and organizational and member commitment and how it contributes to organizational value were explicitly selected to exhibit high validity. I relied on my journaling, transcripts based on the interviews, and audio recordings in the interviewing and data collection process. To prevent lag in recording my thoughts in my reflective journal, I followed Lamb's (2013) suggestion by writing my feelings and experiences as soon as possible after the occurrence happened to improve the data collected.

Procedures for Recruitment and Participation

Expression of Interest

Appendix A is the Expression of interest I emailed to both the USFWC and C2BE. This email identifies worker-owned cooperative organizations within the United States that meet the study criteria and are open to participating in my research study. Appendix B is the Expression of interest email sent to those worker-owned cooperative organizations that have been identified by either the USFWC or C2BE explaining who I am, the purpose of my research study, and an invitation to participate in the research study. Once a worker-owned cooperatives interest in participating in my research, I sent an expression of interest email/consent forms (Appendices C & D) to the employee-owners and managerial personnel. This email explained who I am, the purpose of my research study, and an invitation for participation until I reach 15 participants.

Consent Forms

The Expression of interest letter will double as the consent form, per the Walden University's Institution Review Board suggestion on ethics application. Each participant

was required to reply to my email indicating their consent to participate in my research study.

Member Checking

Once the interviews are completed, I sent a participation and gratitude letter (Appendix E) to each study participant. After conducting the interviews, I summarized my interpretation of their responses to the interview questions for review and sent each participant a copy. Utilizing this validation strategy allowed me to summarize my findings from the study with the participants and encourage participants to provide feedback if the evidence I recorded does not corroborate what the participant expressed (Gutterman, 2017).

Data Collection

The primary data collection method used for this study was virtual semi-structured one-on-one interviews. All interviews were conducted using video conferencing software. I grouped study participants based on regional location and time zone. This approach assisted in the management of multiple study participants that reside in different areas. Before the interviews with the study participants, I formally introduced myself, reiterated the study's purpose, and collected necessary demographic information (i.e., age, gender, educational level, training, and years with the cooperative).

I assumed the role of sole facilitator as well as a note-taker for each interview. I utilized my home office to conduct the virtual semi-structured one-on-one interviews. The length of each interview was between 60-90 minutes. Experts' opinion on the length of interviews varies. However, the general view supports an hour to a half-hour in length

to gather adequate information from study participants (Orvik et al., 2013; Sagoe, 2012). Therefore, all interviews were 60-90 minutes in duration (Irvine, Drew, & Sainsbury, 2013; Rowley, 2012.

In this study, I aimed to explore the mismatch between the organization and the employee-owner in relation to organizational value. I prepared two sets of interview questions for this study. The first set of questions was designed specifically for the employee-owners, and the second set was designed for managerial personnel of the worker-owned cooperatives. Both sets of interview questions consist of 11 open-ended questions that allowed the study participant to discuss their experiences within a worker-owned cooperative. Interview questions address topics specific to worker-owned cooperative cultures such as organizational value, member commitment, and cooperative values (i.e., self-help, self-responsibility, democracy, equality, equity, and solidarity). As for the second set of interview questions for managerial personnel, three out of the 11 questions specifically asked about leadership roles, leadership style, and organizational practices. The goal of the semi-structured one-on-one interviews was that the pre-selected interview questions would encourage a discussion with the study participant and researcher. The aim was to understand the participant's interpretation of the meaning of cooperative values and their relationship with any organizational changes, including the intention to leave the cooperative that has occurred over time.

From the semi-structured interviews, I looked for new themes to arise that are relevant to the topic matter and ask additional questions to further my understanding of the subject. All interviews were audio-recorded and transcribed. In conjunction with the

audio recordings, I used reflective journal notes to complete the transcription of the collected data.

Member Checking

Member checking is the process of assessing the validity of the qualitative study and ensuring the accuracy of the study participant's worldview (Lincoln & Guba, 1985). With this process, during each semi-structured interview, I was the facilitator, confirm the participant's interpretations and responses continually throughout the interview. To verify the accuracy during the interviewing process, I followed Curtin and Fossey's (2007) suggestion by asking: Am I on the right track? Did I understand this in the same manner that you meant it?

Once the semi-structured interviews with study participants and member checking were completed, I provided study participants a copy of a summary of my interpretation of the interview via email so each participant can have the opportunity to review and clarify any misrepresented information from the interview. Data collected from the interviews were transcribed and viewed as a real-world strategy that aided me when I conducted an extended data analysis from the data collected, as Button and Lee (1987) discussed. Once I received completed reviewed transcripts back from study participants via email, I sent a finalized copy to each participant in conjunction with a letter of appreciation and recognition of their participation in this research study.

Data Analysis Plan

The meaning of transcription derives from one's ability to reproduce words usually spoken in an audio-recorded interview into written text (Halcomb & Davidson,

2006). The process of transcribing data is grounded in theoretical positioning versus automatic selection and the application of notation symbolizations (Davidson, 2009). Literature notes that there are multiple ways of analyzing data, and the level of detail of the transcript is dependent on the type of analysis conducted (Halcomb & Davidson, 2006). For example, extensive coding to establish relationships between codes and themes was developed by Glaser and Strauss (1967). Another example of data analysis is verbatim transcription, defined as the word-for-word duplication of verbal data (Poland, 1995).

Constant comparison analysis or coding is the most popular method of analysis in qualitative research (Leech & Onwuegbuzie, 2007). The process of analyzing qualitative data involves reducing raw data into categories or themes based on interpretation (Zhang & Wildemuth, 2017). It is common for qualitative researchers to begin analyzing content in the early stages of data collection (Leech & Onwuegbuzie, 2007; Zhang & Wildemuth, 2017). Doing so enabled me to navigate back and forth between concept development and data collection and assist in directing the research to more subsequent data that may be useful in addressing the research questions (Miles & Huberman, 1994).

Content analysis is another method in the process of analyzing data. Content analysis is defined as classifying written or oral materials into categories (Moretti et al., 2011). Content analysis can be used to examine materials ranging from narrative responses effectively, open-end survey questions, interviews, focus groups, and observations (Abrahamson, 1983; Hsieh & Shannon, 2005). Additionally, the content

analysis identifies the phenomenon studied initially to find relating concepts that describe the phenomenon (Hsieh & Shannon, 2005).

Thematic analysis uses the search of themes that show up in the data as relevant descriptors of the phenomenon studied (Daly et al., 1997). This data analysis process identifies themes by reading and rereading the data (Rice & Ezzy, 1999), which creates pattern recognition. Emerging and reemerging themes become the categories for analysis (Fereday & Muir-Cochrane, 2006). For this research study, the chosen method was a hybrid approach of content and thematic analysis. This approach allowed me (the researcher) to provide a detailed deductive analysis of the data (thematic analysis) (Braun & Clarke, 2006) and inductively (content analysis) prepare, organize, and report the data (Mandal, 2018).

To effectively conduct data analysis, Yin (1989) suggested researchers follow five steps that enable the researcher to examine, categorize, tabulate, and recombine the data collected to address the study's primary goal. These steps are a) compiling, b) disassembling, c) reassembling, d) interpreting, and e) concluding (Yin, 2015). For this study, I incorporated steps of framework analysis combing the Krueger (1994) and Ritchie, and Spencer (1994) approaches. My rationale for selecting this method was that both frameworks provide first-time researchers clear step-by-step instructions on managing the complexity of large data sets usually collected from interviews (Rabiee, 2004).

Framework analysis is an inductive method to analyze qualitative data using ordering and synthesizing data underneath conceptual headings that surface from the

collected data (Baiden et al., 2006). This technique comprises five steps: a) familiarization, b) identification, c) indexing, d) charting, and e) mapping and interpretation (Ritchie & Spencer, 1994). The familiarization stage requires attentiveness in verifying and selecting data collected during interviews. (Parkinson et al., 2016). The second step includes identifying and arranging all the key themes and concepts in which the data can be assessed and referred to (Kiernan & Hill, 2018). This step allowed me to create a detailed catalog of the data and generate labels for the data for a more convenient retrieval later in the data analysis process.

The indexing step is the third step in the process of framework analysis. This step uses coding techniques to sift, highlight, and sort the data making comparisons within the study (Rabiee, 2004). The fourth step in framework analysis is charting, which comprises reviewing and reorganizing the data. Charting means that I took the quotes from the original form and rearrange them under a new thematic content, showing the connection between each data set and heading (Kiernan & Hill, 2018; Rabiee, 2004). The final step in the data analysis process is mapping and interpreting. Mapping and interpreting the data focuses on defining core concepts for analyzing data while forming typologies and searching for associations of patterns across and within categories (Rabiee, 2004). For example, using criteria that have already been established for interpreting codes such as words, context, internal consistency, frequency, the specificity of participant's comments, the intensity of comments, and big ideas helped better analyze the data (Rabiee, 2004).

Computer-Assisted Qualitative Data Analysis Software

I used Computer Assisted Qualitative Data Analysis Software (CAQDAS) to analyze and identify themes from the collected data for this study. Since its development in the 1980s, CAQDAS has advanced the qualitative research field and has assisted researchers in coding, retrieving, and analyzing data that may be otherwise tasking if done manually (Woods et al., 2016). In the 1990s, CAQDAS became widely accessible to the public for qualitative research. (Rademaker, Grace, & Curda, 2012).

The computer-assisted qualitative data analysis software selected for use in the research study was NVivo. Since its inception in 1981, NVivo has evolved into a software system built for qualitative and mixed-method research. In essence, NVivo is a computer-assisted data analysis software designed to help the researcher manipulate data and coding data, annotate data and gather data records accurately and swiftly (Richards, 2002). Also, NVivo can record and link ideas so that the software program searches and explores the data for patterns (Azeem & Salfi, 2012). The latest version of NVivo allows the researcher to import data from multiple sources such as text, audio, video, emails, images, online surveys, and content from the web and social media sources. NVivo works interchangeably with Microsoft Office Suite. NVivo allows importing of spreadsheets and notes and automatically grouping information to create themes, analyze social networks, assist in creating mind maps, comparison diagrams so that the researcher can view data to see if any inter-relationships within a group exists.

Data Saturation and Triangulation

In qualitative research, data saturation is the gauge that researchers use to determine when data collection and analysis can be discontinued (Saunders et al., 2018). Many authors and researchers refer to data saturation to increase qualitative rigor (Fusch & Ness, 2015; Morse, 2015) or a necessary rule to conduct subsequent qualitative research (Sparkes et al., 2011). Another perspective of data saturation is viewing informational redundancy from the individual study participant and not just the dataset (Legard et al., 2003). Individual participant data saturation is achieved when the researcher has probed the participant in an interview to the point of fully understanding the study participant's point of view (Legard et al., 2003).

Triangulation of study data is a validation process in which multiple data sources are used in the same study (Hussin, 2009). Mainly there are three types of data triangulation; (a) time, (b) space, and (c) person (Denzin, 1978). When determining a research study's data robustness, the results of data triangulation can be based on the time in which data was collected, the individuals involved in data collection, and the environment in which information was collected (Begley, 1996). In achieving data triangulation, I implemented multiple data sources and data collection processes, including member checking to establish the reliability of the information gathered from the data.

Issues of Trustworthiness

Credibility

The criteria used in qualitative inquiry to determine trustworthiness are internal and external validity, reliability, and objectivity (Zhang & Wildemuth, 2016). Credibility refers to the sufficient representation of the constructs of the social phenomenon studied (Bradley, 1993). Additionally, credibility necessitates participants being accurate representations of the social world learned for the researcher to report the perspectives accurately (Mandal, 2018). It is recommended that researchers employ activities such as (a) persistent observation, (b) triangulation, (c) member checking, (d) prolonged engagement in the field, (e) peer debriefing, and (f) checking interpretations against raw data to increase the credibility and internal validity of the research results (Lincoln & Guba, 1985).

Within this study, I employed methods of data triangulation for data analysis following the suggested strategy by Denzin (1978). I incorporated in this study to increase credibility member checking in conjunction with sense-making, using computer-assisted qualitative data analysis software, specifically NVivo, to organize that collected data and prep for data analysis, and applying the blended approach of a case study.

Transferability

External validity occurs when the generalizability of empirical data is transferable to new settings and populations (Pearl & Bareinboim, 2014). Generalizability and transferability are similar. The literature states that the goal of generalization, specifically in the insists of a case study, is for the reader to have the ability to determine if or how

experiences mentioned in the study can be used in a new situation based on a thick description (Stake, 1994). Therefore, the findings from the research study require authenticity in the manner that the results from the study represent the realities of other populations (Polit & Beck, 2012).

For the findings from this research study to be transferable, the participant selection and the organization studied should be a general representation of other organizational structures. The selected organizational structure for this study is considered an alternative business model versus traditional business models. Therefore, the results may not be transferable to readers within a traditional hierarchal organizational structure. Transferability is at the discretion of the individual reader, and they can determine which findings are transferrable (Marshall & Rossman, 2011). The requirement for the study participants is to provide an accurate description of the perspectives and experiences of the phenomenon being study. Therefore, participants are expected to provide honest and detailed answers to the research questions.

Dependability

Dependability within qualitative inquiry is achieved when the researcher's interpretations of the changing conditions of the phenomena studied are articulated in the internal process (Bradley, 1993). Also, dependability or reliability refers to the stability of data over some time (Mandal, 2018). In ensuring the trustworthiness of this study, I engaged a thorough audit trail. Selection criteria, selection of participants, details, and characteristics of the participants were made clear (Mandal, 2018). Also, the data

collected from the virtual semi-structured one-on-one interviews are the data sets that supported the use of a case study design with this research study.

Confirmability

Confirmability refers to the specific systematic recording of decisions made during the research process and the implementation of analytical procedures (El Hussein et al., 2015). By showing confirmability of one's research, the researcher is recording study-related activities over a specific time so that other readers can follow (El Hussein et al., 2015). I maintained confirmability through my reflective journaling and triangulation of data. My journal entries focused on my rationale concerning methodology, personal feelings, and experiences during this process and my documentation of how my perceptions, personal biases, and culture influenced the research process.

Ethical Procedures

With all types of research, specifically in qualitative inquiry, the relationship between the researcher and the study participant can create an array of ethical concerns (Sanjari et al., 2014). For example, the intimacy between the researcher and the participant during the study may impede respect of privacy, establishing honest and open interactions, and a misrepresentation of the participants (Warusznski, 2002). To address ethical issues, researchers should make the protection of the participants a priority. Also, it is the researcher's responsibility to assess the benefits and associated risks with the research study (Peter, 2015).

In ensuring that the participants are protected during this research study, I provided study participants full disclosure regarding the objective of the research study,

including the purpose of this study, methodology, and use of outcomes. Additionally, participants were made aware of their rights of voluntary participation and withdrawal from the study (if one so chooses) without penalty through the Expression of Intent and Consent Document. Within the consent document, participants were informed of the privacy and confidentiality procedures. In addition to providing participants with their rights, I explained the data collection procedure used for this research study.

When writing this research, I protected sensitive information relating to the identity of the participants described in the data collection section of this chapter by following the procedures outlined in the data collection section. Lastly, I made a final report of my findings available for the participant's review for member checking purposes. Also, I provided the study participants with my contact information if they chose to contact me to address any concerns relating to the study. I will store data and information obtained from this research study for a minimum of five years before I destroy the data.

Summary and Transition

This chapter described the methodology for this research study and my rationale for selecting a case study as a suitable method for exploring the mismatch between the organization and the employee-owner in relation to value. I reviewed the role of the researcher and explained the case study approach. Also, I addressed methodological considerations for this study, including participant selection logic, an explanation of the sampling method used for this study, and why I selected to use a homogeneous sampling technique.

The reiteration of the overarching research question provided a further description of the research design. This chapter also depicted the specific instrumentation used for this study, including virtual semi-structured interviews, archival material review, and reflective journaling. This chapter also covered procedures for both data collection and analysis. Furthermore, this chapter illustrated the reliability and validity of the study. I concluded Chapter 3 by addressing the trustworthiness and ethical procedures for this research study.

In Chapter 4, I review the purpose of the study, along with the review of the overarching research question. Additionally, Chapter 4 covers the results and findings concerning the data collected and analyzed.

Chapter 4: Results

The purpose of this qualitative case study was to explore the mismatch between employee–owner and the organization in relation to organizational value. In Chapter 4, I discuss the specific processes used in this study, which included reflective journaling, archival materials and document review, semistructured one-on-one virtual interviews, and member checking. Using a case study research approach, I explored the study participants' perspectives on worker-owned cooperatives and how these individuals identify with their organization. Chapter 4 covers the study setting, demographics, data collection, data analysis, results, and evidence of trustworthiness.

The data collected from this qualitative case study were used to answer the overarching research question: What are the mismatches, if any, between individuals who work in a worker-owned cooperative and the organization in relation to organizational value? The overarching research question was used to guide this case study. In virtual semistructured one-on-one interviews using video conferencing software, I presented 11 interview questions to each employee–owner participant and managerial personnel participant. Study participants' responses to interview questions guided the research findings. Each employee–owner participant was a member of their respective worker-owned cooperatives located in the United States.

Setting

Throughout the data collection process, I employed reliable means to conduct the research. I used delimitation of the interviews, review of archival material and documents, and an interview protocol as stated in Chapter 3.

All 15 study participants volunteered for the study and participated without any influence, incentives, promises, or expectations regarding their relationship with the partner organizations that might have affected the research results. The participants' years worked in the worker cooperative industry were a wide range. All participants displayed a willingness to discuss their perspectives on worker-owned cooperatives, organizational value, affective member commitment, and their roles and responsibilities regarding positions held in their cooperative organizations.

I had no prior relationship with any of the study participants or the organizations where they worked. I did not work for or hold any position with a worker-owned cooperative while conducting this study. My nonexperience with worker-owned cooperatives and the study participants not having previous knowledge of me, my research, the research question, and interview questions, showed no evidence to demonstrate any experiences or changes that influenced the study results.

Demographics

I chose participants for this study as described in Chapter 3. To present the research, I sent an email invitation letter to two partner organizations (USFWC and C2BE) requesting the use of their membership database in identifying worker-owned cooperative organizations in the United States that would meet the study criteria (see Appendix A). USFWC responded to the invitation letter and provided a response email permitting me to use their membership directory to recruit participants for this study. USFWC's membership directory includes 200 organizations representing 6,000 worker–owners across the United States. The USFWC's membership directory features 14

industries the federation serves, with 25 subindustries that fit under the primary industries' umbrellas.

After reviewing the USFWC's membership directory, I created a Microsoft Excel spreadsheet to help organize the worker-owned cooperatives that I sent an invitation letter to. I contacted a total of 161 worker-owned cooperatives from the directory and multiple cooperative organizations responded to my invitation email stating that due to unforeseen challenges from the global pandemic (COVID-19), their cooperatives were no longer in operation. Twenty-two organizations expressed interest in participating; seven of the 22 cooperative organizations declined participation, stating it was not a good time to participate, and one participant ultimately withdrew. I obtained a sample size of 15 employee–owners from 14 worker-owned cooperatives representing eight industries in various locations of the United States. Table 1 shows participant gender demographics. Table 2 shows the age range and the race/ethnicity of the study participants. The age ranges and races/ethnicities reflect the total participant pool within the eight industries represented in this study. Table 3 shows the years of employment, regional location, and industry of the worker-owned cooperatives represented in the study.

Table 1

Participant Gender Demographics (N = 15)

Gender	*n*	%
Male	9	60
Female	6	40

Table 2

Participant Age and Race/Ethnicity Demographics (N = 15)

Demographic	n	%
Age range		
18–24	–	–
25–34	5	33.33
35–44	4	26.66
45–54	2	13.33
55–64	2	13.33
65+	2	13.33
Race/ethnicity		
White/Caucasian	11	73.33
Black/African American	–	–
Hispanic/Latino	–	–
Asian/Asian American	2	13.33
Native American	–	–
Other	2	13.33

Note. Dash represents unrelated data.

Table 3

Years of Employment, Regional Location, and Industry Overview

	n	%
Employment (years)		
≤ 1	1	6.66
0-1	1	6.66
1-3	1	6.66
3-5	3	20.0
5+	9	60.0
Location		
Northeast	2	13.33
Northwest	5	
Midwest	3	20.0
Southeast	4	26.66
Southwest	1	6.66
Industry		
Technology	2	13.33
Business support	3	20.0
Construction	3	20.0
Cafés & bakeries	3	20.0
Landscaping	1	6.66
Agriculture	1	6.66
Education	1	6.66
Cleaning service	1	6.66

I scheduled semistructured one-on-one virtual interviews with all 15 participants who were employee–owners—both founders and nonfounders—of worker-owned cooperatives. Each participant identified that their position was related to a leadership role in some capacity due to worker-owned cooperatives' organizational nature and culture. Therefore, based on my recruitment procedure (mentioned in Chapter 3), I randomly selected three participants to include in the second data set for managerial personnel.

Each interview participant replied to the invitation email before I began the interview. Four out of 15 participants articulated concerns regarding ongoing challenges and changes to the daily operations of their organizations due to COVID-19 and the ability to remain open during the pandemic. As the study participant final sample has representation from the majority of the potential population, I believe the sample size met the study requirements based on the chosen topic. I also believe the data gathered from study sample were able to answer the research question.

Data Collection

I included multiple sources in the data collection process, such as reflective journaling, interview responses, archival document analysis, and member checking results. As the researcher for the study, I was the primary instrument for collecting and analyzing the data used. The research sites were a representation of each study participant's respective environment. A purposive sample included 15 participants, including founding and nonfounding members of various worker-owned cooperatives in the United States. Due to COVID-19, 12 of the 15 study participants used home offices

as the site for the interview. The remaining three participants completed the interview on-site of their respective offices in their organization's physical location.

I used a membership directory from USFWC to search for the websites of each worker-owned cooperative. I also used the internet to contact each worker-owned cooperative by emailing the specific contact person listed on the website and sending an email through the organization's *contact us* section on their website. After the initial contact, I shared a video conferencing link to the study participant to log on during an agreed-upon date and time for the interview. Each study participant had a different video conferencing link specific to their interview. I chose to use different video conferencing links for each study participant to mitigate the accidental sharing of confidential information.

I collected data used in this study as part of a 6-month case study to explore the mismatch between the organization and the worker–owner in relation to organizational value. Throughout data collection, I conducted virtual one-on-one semistructured interviews using computer-mediated communication software. I conducted all interviews from my home on my personal computer. I used Microsoft OneNote for reflective journaling and note taking. I also used documents such as organizational charts and organization by-laws provided by participants as part of the data collection and analysis.

Walden University's Institutional Review Board granted ethical approval on June 12, 2020 (approval number 06-12-20-0315703). I began the 6-month data collection period from the first interview on July 24, 2020, to January 14, 2021, with emails to potential study participants I gathered from business contact information. I sent out

emails to each worker-owned cooperative organization listed in the Microsoft Excel spreadsheet I created until I reached the sample size of 15. I conducted a final interview on January 14, 2021, and received a final transcript review on January 30, 2021.

Instrumentation

I employed one-on-one virtual semistructured interviews, document reviews of archival material, member checking, and reflective journaling as methodological triangulation for this case study. Before conducting the study, I had no working or personal relationship with any worker-owned cooperatives or participants during the data collection process. I completed the one-on-one semistructured interview sessions within approximately 1 hour per session. Participants were asked 11 interview questions.

I recorded each interview using the record option on the computer-mediated communication software for recordkeeping and comment validation purposes. I saved each recorded interview on a password-protected external drive as an mp4 file. After each interview, I used Microsoft OneNote to journal my experience, as noted in Chapter 3. Once the interview recording was saved to the external drive, I deleted and properly closed the video conferencing link for security purposes.

During the data collection process, I did not encounter any difficulties that resulted in an alteration or impediment regarding the remainder of the process. Every participant was proficient with using the internet and computer-mediated communication software. I did not have to provide participants with instructions downloading the software, accessing the video conferencing link, or any other steps relating to the virtual

interview. The interview protocol and process I used for this study were effective. Participants' comments did not substantially differ from other responses.

I used QuickPlayer to playback the recorded interviews to ensure the audio of the recording was clear and not distorted. I used NVivo Transcription as a transcribing service to dictate the recordings and employed three to five hours to transcribe each interview. NVivo Transcription took approximately 35 minutes to transcribe each interview. To ensure the accuracy of the transcript, I replayed the recording along with reading the written transcript and edited the transcript to reflect what the participant expressed. This process collectively produced almost 15 hours of oral data concerning organizational value, affective member commitment, leadership styles, and organizational fit.

I exported each NVivo Transcription file into a Microsoft Word document and saved the Word document in a separate folder on the password-protected external drive. I assigned a number to each transcript and participant in the study to protect each participant's identity. I employed member checking by emailing each participant a copy of the transcript requesting feedback regarding the interview to ensure the participant's responses to the interview questions were accurate. The participants then returned the transcripts to me via email. The participant comments reflected a thorough understanding of the purpose of the questions.

After I completed coding and analysis of the research data, I sent the participants a copy of my summary of the study results. I also sent a letter of gratitude (Appendix E) to each participant, expressing my appreciation for their voluntary participation in the

research study. I ensured each participant that their interview and information would be saved on an encrypted password-protected external drive that only I had access to and would be saved for 5 years.

Data Analysis

The focus of this research study was to explore the mismatch between the organization and the worker-owner in relation to organizational value. It concerns the conceptual frameworks of P-O fit and value congruence as possible practice models for cooperative professionals and practitioners. I employed framework analysis (Kiernan & Hill, 2018; Ritchie & Lewis, 2003) as the analytical method analyze the data. My study did not have an a priori theory, but it anticipated that meanings and themes would emerge from the data (Lincoln & Guba, 1985). The overarching research question allowed me as the researcher to utilize an inductive technique to analyze the data. This approach allowed me as the researcher to explore the context and create themes from open coding the data (Bonello & Meehan, 2019).

The data analysis process used for this study included the review and analysis of organizational documents and archival material, interview responses, reflective journaling, and member checking. The challenge I faced as a first-time researcher was reducing such a large volume of information. Implementing framework analysis allowed me to reduce data, identify significant patterns and themes, and create a framework for explaining the data (Patton, 2002).

I used the latest version of NVivo to organize, categorize, arrange, and manage the collected information from the virtual semistructured interviews to identify common

themes. I created two data sets, one for the three participants representing managerial personnel and the other data set representing employee-owners. Based on the interview responses from all participants, there was no significant deviation among participant responses. Therefore, the same codes represent both sets of data.

The framework approached allowed me to gain an overview and make sense of the data. By following the five stages of this approach, I moved from describing the data to interrupting the data. The following sections outlined the five stages of the framework approach and how I applied it to the data analysis.

Familiarization

In this stage, I gathered all the collected data to familiarize myself with the material. By listening to recordings, reading transcripts, and reflective journaling notes multiple times, I immersed myself in the data. I used Survey Monkey to collect participant demographic information and imported the demographic details into NVivo. Once I manually entered each participant's video file, I created cases for each study participant. Cases are people, organizations, or other entities that constitute the unit of analysis in a project (Bonello & Meehan, 2019). Each case contained participant interview, transcript, organization information, and organizational documents.

Next, I started exploring coding. Codes refer to a word or short phrase that is symbolic of language-based or visual-based data (Saldaña, 2015). During this stage, open coding allowed for free codes to emerge. Free codes support grouping codes into nonhierarchical categories that freely emerge themes out of the data (Fornari & Fonseca,

2020). With each transcript, I used NVivo to color code and highlight each new emerging code.

Identification

In this part of the data analysis process, I began to recognize repeated themes from the data. I analyzed each interview question separately to identify recurring themes based on the interview questions. This process allowed me to think about the themes abstractly. Toggling back and forth between sources (i.e., interview responses, reflective journal notes, documents, and archival material) permitted me to list ideas derived from the data.

At the end of this stage, I had completed the preliminary coding of the 15 transcripts. From these transcripts, a significant number of free codes emerged. Each free code was defined and provided detail to each interview question. Table 4 list the preliminary free codes the emerged from the data.

Table 4

Preliminary Free Codes From Interview Questions

Interview question	Free codes
1	Perception, understanding
2	Motivation
3	Organizational value
4	Member commitment
5	Role and responsibilities
6	Leadership style
7	Organizational practices
8	Cooperative values, equality, self-help, solidarity, workplace democracy
9	Organizational fit
10	Leadership alignment
11	Resignation, turnover

Indexing

This stage aimed to take the data from the first two stages and implement it into a thematic framework (Pope et al., 2000). By this point, I made sense of the data and related it to the overarching research question. Many of the free codes from the preliminary coding stage were renamed or condensed into relatable categories. This process showed how participants were constructing meanings of P–O fit and value congruence from the noticeable patterns. Table 5 demonstrates the new themes and subthemes that emerged from the preliminary free codes listed in Table 4.

Table 5

New Themes and Subthemes From Free Codes Categories

Theme	Subtheme
Collective entrepreneurship	Profit-sharing, anticapitalism, workplace democracy
Decision making	Ethics, participation, control, stability
Support	Passion, sponsorship, candidacy
Patronage	Investment, buy-in
Value	Mission statement, commitment

Charting

This fourth stage of framework analysis involved taking quotes from the original transcripts and rearranging them under a new thematic context. In this stage, I did not use NVivo to create tree codes or matrix queries. Instead, I used handwritten sticky notes as a more straightforward method to charting the reconstructed data. By doing this, I shifted my thoughts from the transcripts of interview responses to a deeper understanding of the data.

Mapping and Interpretation

In the final stage of the analysis process, I interpreted the data. In identifying patterns across and within categories, I determined connections between participant interview responses, reflective journaling notes, document, and archival material, and member checking using the indexing and charting stages to inform inductive reasoning. By the end of this stage, I was able to form claims regarding affective member commitment among worker-owners. A further explanation in the results section of this chapter.

Evidence of Trustworthiness

Credibility

To achieve internal validity or credibility, I employed methods of triangulation. One triangulation activity that I used was validating participants' statements during the virtual semistructured interview sessions. I also provided participants with a copy of the interview transcripts for additional review and commentary for member checking purposes. This process allowed participants to validate or refute any interpretations that I may have misunderstood or correctly translated. Another triangulation activity I employed was personal reflective journaling after each interview session following the journal suggestions by Lamb (2013). Personal reflective journaling allowed me to write my personal feelings, thoughts, and experiences in note form. I also compare my reflective journal notes, documents, and archival material with the conceptual frameworks to ensure alignment.

Transferability

Worker-owned cooperatives are identified as alternative business structures where the employees collectively owned and democratically self-manage the organization (Sutton, 2019). Study participants represented worker-owned cooperatives from various industries in the United States. The findings of this study show that worker-owned cooperatives are not traditional hierarchical structures. Each organization in this study governs itself that best reflects industry practices and regional location. Therefore, outcomes from this research study may not be transferable to other forms of business.

Nonetheless, readers can decide whether the outcomes presented in this study is transferable. Participants in this study provided accurate and detail descriptions regarding their perspectives, experiences, and feelings about worker-owned cooperatives. I did not adjust the transferability strategy, and all study participants willingly participated in the study.

Dependability

I attained dependability within the study by engaging in a thorough audit trail. I documented all procedures and relatable information concerning the outcomes of the study. The audit trail I employed tracked information which included using reflective journal notes and written interview protocol. Additionally, I transcribed all participants' interviews precisely, uploaded, and saved all interviews to a password-protected external drive. I also saved uploaded and saved all recordings from QuickPlayer onto the same password-protected external drive. I created separate folders for recordings and transcripts on the external drive of participant files.

The audit trail reflected a clear representation of the research path I selected and my decisions concerning the process chosen to evaluate, organize, and manage research data. The data collected from the virtual semistructured one-on-one interview support the use of the methodology and case study approach with this study.

Confirmability

I attained confirmability through reflective journal notes. I journal my personal feelings and experience from the start of data collection to the completion of data analysis. The entries consisted of my rationale concerning methodology, personal feelings, and experiences during the data collection and analysis process. In addition to reflective journaling, I implemented triangulation methods to achieve confirmability.

Results

In this study, the overarching research question was: What are the mismatches, if any, between the organization and the individuals who work for a worker-owned cooperative in relation to organizational value? In the process of analyzing the data, five themes emerged that addressed the research question. Predominant within the results were participant perspectives of how an individual, and the organization's choices can influence the perception of value. As stated previously in this chapter, the themes represent both employee-owner and managerial personnel perspectives on worker-owned cooperatives and organizational value.

Theme 1: Collective Entrepreneurship

Economic and management literature conceptualize collective entrepreneurship as an emerging synergism that propels an organization to a state where opportunity is the

center of focus and entrepreneurship in teams is encouraged (Stevenson & Jarillo, 1990). In exploring this phenomenon, collective entrepreneurship can reflect the skills, intelligence, and experiences of individuals who come together to create or expound on ideas that could not be achieved on their own (Riberio-Soriano & Urbano, 2010). In its essence, collective entrepreneurship, like worker-owned cooperatives operates on the philosophy of mutual help, solidarity, and shared feelings (Comeche & Loras, 2010).

This connection between collective entrepreneurship and the perception of worker-owned cooperatives emerged from the interview data analysis. Participant 10, a man between the ages of 45-55 who is a founding member of a cooperative bakery representing the employee-owner data set, explained his perception of what a worker-owned cooperative is stating:

> Aside from legal definitions, what we are hoping to create, whatever the government is going to describe us as is a group where via the tools of shared power and shared information, the ownership and equity within the business is shared not based on anything, but sharing equality. So, it's not about who showed up with the most money first or the most skills first or whatever. It's about sharing a business.

This form of entrepreneurship embodies the collective excellence element associated with the necessary collaboration to make cooperative organizations successful. Additionally, this type of thinking fosters an interpersonal understanding of forming a solid collective capacity (Haskins et al., 1998).

A key factor to collective entrepreneurship is viewing individuals or employee-owners as the nucleus of the organization. Participant 5, a woman between the ages of 35 and 44, a nonfounding member of a business service cooperative representing the employee-owner data set, expressed her perception of collective entrepreneurship by stating:

> When I'm talking to people about worker-owned co-ops, I often say it's a place where the people who work there own the business and that it's a shift from being focused on profits only to what the workers need or want.

As shown by Participants 5 and 10 perspectives on worker-owned cooperatives, cooperative organizations promote active citizenship and commitment of workers on the individual level. Also, both participants' perspectives reflect their respective cooperative by-laws, which emphasize the importance of the cooperative principle of autonym.

Theme 2: Decision Making

The participant interview responses helped me understand the organizational culture and business nature of worker-owned cooperative decision making. As the interviews progressed, I noticed that several participants had similar attitudes concerning collective decision making. Collective decision making within cooperative organizations consists of members investing time and effort in learning the organization and their fellow employee-owners' preferences (Hansmann, 1998). Additionally, collective decision making can also include employee-owners attending meetings (Bretos &Marcuello, 2017).

Participant 2, a woman between the ages of 35-44, a nonfounding member of a tech cooperative representing the managerial personnel data, expressed how leadership in her worker cooperative is "nonhierarchical", which leads to affective collective decision making. Nonhierarchical governance enables members to offer their ideas to the organization. When asked about decision-making processes in her cooperative, her words were:

> We don't have hierarchical leadership. Everything is horizontal. So, everyone gets a say. And even for people who are still on worker owner track (people that are not employee-owners yet), but are still just workers, we do also include them in that decision making process.

Additionally, Participant 2 further explained how collective decision making within her cooperative inspires fellow employee-owners to provide resolutions to work-related challenges by stating, "The decisions that we make internally are meant generally for our favor that we're trying to take care of ourselves and each other. We're here to support each other." All worker-owned cooperatives represented in this study enforce a workplace democratic voting system that gives each employee-owner one vote in the decision-making process.

There are some instances where collective decision making does not always translate as a smooth or consensus process. Participant 14, a woman between the ages of 45-55, a nonfounding member of a pizzeria representing the employee-owner data set, highlighted how participative management and collective decision making can become a challenge depending on the size of the cooperative. Her words, "Sixty-six people (in our

cooperative) and a lack of a handbook… we're really butting up against some…some really difficult decision making."

Theme 3: Support

As cooperatives hire new employee-owners, trial periods are implemented to vet new members and for existing employee-owners to collectively decide whether the potential new hire is a good fit. Also, trial periods allow potential new employee-owners to explore whether a worker cooperative is the best work environment for them. During my interviews, each study participant shared examples of employee-owners providing support to new members of their cooperatives. Participants used "sponsorship" or "candidacy" to describe the support and the trial period phase.

In this study, the length of the trial period ranged from 6 months to 5 years. Participant 12, a man between the ages of 35 and 44, a nonfounding member of a construction cooperative representing the employee-owner data set, shared that the trial period for his cooperative is five years. He further explained stating:

> So, you know, to become a full member, you have to be part of our company for 5 years. And so, we kind of determined 5 years was a good length of time for somebody to become a member because, you know…we can see if they're invested in the trades and gonna stick around for the company.

Participant 1, a man between the ages of 35 and 44, a founding member of a tech cooperative representing the managerial personnel data set, shared his thoughts on sponsorship in his cooperative. When I asked him to share about the sponsorship process, Participant 1 said:

> …and one way you can do this is through sponsorship. You can like say, hey, you're a new member, this guy or this woman is gonna pick you and sponsor you for the next year. You can come to them with any question you have. Don't feel uncomfortable, you know…asking difficult questions about how the co-op works. They are here to be your support person, because a lot of times if you don't do that, they're just like, who do I ask? I don't know what to do. If I ask my team lead that might make it look bad.

The emerging theme "support", explained in this study, supports the conceptual framework P–O fit. Support was also apparent in the document review of participant's organization by-laws.

Theme 4: Patronage

A patronage is a form of financial participation that every employee-owner contributes. Per cooperative principles set by the ICA, financial participation is a way for worker-owned cooperatives to establish a commitment to building community wealth via profit sharing (Nilsson, et al., 2012). Upon membership, it is a requirement for employee-owners to financially contribute to the cooperative through a "buy-in" process. Data from this study reflect the variations of buy-in cost associated with member-ownership. These buy-in costs ranged from zero dollars upward to $10,000.

Participant 3, a man between the ages 25 and 34, a nonfounding member of an education cooperative representing the managerial personnel data set, explained the buy-in cost for his cooperative and how employee-owners can pay, stating:

> So our membership process is sort of something we're tweaking. But basically, what it started as is its five hundred dollars and you have to have worked for 2 years, been employed for 2 years, and then you can become a member. We also allow people to do one hundred dollars down and payroll deductions for a year as a 26 payroll deductions.

Data from this study also showed that profit-sharing only happens when cooperatives make a profit. Suppose for any reason the worker-owned cooperative does not reach or surpass financial goals in a fiscal year to pay employee-owners a patronage dividend; in that case, employee-owners do not receive a patronage payment. Participant 6, a man between the ages of 25 and 34, a nonfounding member of an agricultural cooperative representing the employee-owner data set, shared why his cooperative does not pay patronage dividends by saying:

> In a co-operative, the profits of the cooperative would be distributed in a fair way among its members if it would profit. We don't pay patronage dividends currently because we're not profitable enough to. We just we don't. There's a lot of cooperatives that don't pay patronage dividends.

One challenge that can arise with patronage is when an individual decides to leave the cooperative. Employee-owners' ownership of capital contributed to the worker-owned cooperative leads to capital variability when the cooperative does not have the shares needed to pay back the quitting employee-owner at the time of resignation (Tortia, 2018). Data from this study confirms this notion of patronage payment upon resignation. All study participants noted that when an individual leaves the worker-owned

cooperative, payment can be rendered in installments until paid in full if the shares are unavailable.

Theme 5: Value

Organizational value congruence is the characteristics of an individual's belief in the organization's goals, ethics, and principles (Ahmad, 2018). Correlating with value congruence is affective member commitment. Affective member commitment is an employee's emotional and psychological connection to, identification with, and enjoyment of members of the organization (Allen & Meyer, 1990). Data from this study confirmed that all participants viewed affective member commitment (referred to in this study as affective member commitment) similarly. When both the individual and the organization's value congruency aligns, it results in positive job satisfaction and increased work performance (Ahmad, 2018). In addition, employee's desire to stay with the organization long-term increases (Meyer & Allen, 1997).

Participant 4, a man between the ages 25 and 34, a founding member of a construction cooperative representing the employee-owner data set, shared in his words:

> That...like I said, if you can be doing something that you like, that you enjoy doing, and that you can also feel is important to the company or to the task, the job at hand then I think there's a certain satisfaction that comes from that. And I think that helps.

Participant 4 further explained that when employee-owners perform tasks that they deem necessary, this can result in positive work attitudes from the employee-owners. Thus, participant 4 and the rest of the participant's responses to the interview question about

affect commitment helped identify the pattern that aligned with organizational identification and effective organizational fit in worker-owned cooperatives.

Themes and the Research Question

As stated in Chapter 1, the overarching research question for this study is: What are the mismatches if any between the organization and the employee-owner in relation to organizational value? I produced themes that emerged from the interview questions that addressed the research question based on analysis of participants' responses, document and archival material review, reflective journaling notes, and member checking. The emerging themes from Tables 4 and 5 demonstrated patterns regarding the matches between the organization and the employee-owner to organizational value. The emergent five themes in Table 5 showed no association with the overarching research question. Instead, they demonstrated an association of the literature review, the conceptual frameworks for the study, and matches for organizational value between the two entities. Therefore, the emergent themes from the study's data analysis did not show any mismatches between the organization and the employee-owner of worker-owned cooperatives to organizational value.

Summary and Transition

Data collection methods resulting from interview responses, reflective journaling, document and archival material review, and member checking were used to answer the overarching research question: what are the mismatches, if any between the organization and the individual who works for a worker-owned cooperative in relation to organizational value. In pursuing this research question, I employed a qualitative

methodology with a case study approach in establishing the context for this study. The responses to the virtual semistructured one-on-one interview questions shared by 15 study participants were critical in developing an in-depth understanding of the research question.

The specific free codes and themes that emerged from the conceptual frameworks of P–O fit and value congruence, interview responses, and other triangulated data resulted in the establishment of 5 common themes. These five common themes are collective entrepreneurship, decision making, support, patronage, and value. Study participants described in their own words their perspectives on these themes while relating the common themes to worker-owned cooperatives, organizational fit, organizational value, and affective commitment.

Based on this study's data analysis and conclusions, employee-owners of the represented worker-owned cooperatives share a commonality of perspectives and experiences. From the support of the common themes throughout the data analysis process, I accomplished theoretical data saturation. Therefore, no new themes or perceptions emerged from the data.

To summarize, Chapter 4 covered the findings of my research study, research setting, demographics, data collection, data analysis, evidence of trustworthiness, and study results. Finally, Chapter 5 presents of the interpretation of the study findings, limitations of the study, recommendations, and implications of the study.

Chapter 5: Discussion, Conclusions, and Recommendations

In this qualitative study, I aimed to explore the mismatch between the organization and the employee-owner in relation to organizational value. Specifically, I analyzed the overarching research question: What are the mismatches, if any, between the organization and employee–owners in relation to organizational value? In addition, I used the conceptual frameworks of P-O fit and value congruence to explore the perspectives of employee–owners and managerial personnel of worker-owned cooperatives. The nature of the study was a case study with 15 participants.

I accomplished the purpose of the study through analyzing data collected from the participating worker-owned cooperative organizations representing 11 industries, including virtual semistructured one-on-one interview responses, reflective journaling, and document and archival material review. Additionally, data analysis included a literature review and member checking. The participants of the study were male and female worker–owners. During the data collection process, I became aware that in worker-owned cooperatives, it is the culture that every employee–owner assumes the role of manager or leader in their own right, unlike distinctive clear titles and roles seen in traditional corporate organizations. From the data emerged free codes and themes. These themes are collective entrepreneurship, decision making, support, patronage, and value. The results of this study support the literature review in Chapter 2. The following is the interpretation of the themes from the study results.

Interpretation of Findings

Findings from this research study confirmed the literature review in Chapter 2 and contributed to the existing research and scholarship in the worker-owned cooperative sector. The literature showed the complexity of factors required to sustain a worker-owned cooperative organization, the significance of matching the organization and the employee–owners' needs, and affective member commitment from the employee–owners who work for cooperative enterprises. Affective member commitment includes two elements: economic involvement and cooperative governance participation (Bareille et al., 2017). All 15 study participants supported the importance of affective member commitment to their respective worker-owned cooperative success. Thus, affective commitment emerged from the data, and I classified it as Theme 5 *value*.

The connection between affective member commitment and Theme 5 aligns with the conceptual theory of value congruence. Value congruence is the similarity between an individual's values and those of the organization (Lamm et al., 2010). As identified in this study, employee–owners contribute to the organization by attending meetings and voting. The study results reflect that affective member commitment through governance participation can be challenging depending on the cooperative's size. Furthermore, the additional determinant of trust plays a role in influencing employee–owners to comply with the core ethics and principles of the worker-owned cooperative while maintaining organizational culture.

The other element of affective member commitment, economic involvement, relates to Theme 3 *support*. Studies have shown that economic involvement is a critical

factor for worker-owned cooperatives due to two aspects. One aspect is that employee–owners' economic involvement can directly influence the level of business sales a worker-owned cooperative has in a fiscal year (Hernandez-Espallardo et al., 2013). Secondly, high economic involvement translates to higher patronage dividends paid to the employee–owners (Hernandez-Espallardo et al., 2013). The literature from Chapter 2 also supports that financial participation in worker-owned cooperatives benefits the employee–owners and the organization's long-term investment goals. High economic involvement gives worker-owned cooperatives a competitive advantage (Tuominen et al., 2013) and expands the overall business entity (Syrjä et al., 2012).

The interpretation of the study findings also supports the literature review regarding the conceptual framework of P–O fit theory. The notion that worker-owned cooperative members implement trial periods to observe whether a potential employee–owner is a good fit for their organization and provide sponsorship opportunities directly reflects of the cooperative organization's commitment to an employee–member's success. Furthermore, the findings offered understanding with the literature review concerning supplementary fit and resulting attributes of good work performance and attitudes and a high level of commitment from worker–owners.

The perspectives and experiences shared by the participants indicate that the culture of worker-owned cooperatives encourages each worker–owner to fully take responsibility for their level of engagement in the organization. Additionally, participants' reflections indicate that leadership within cooperative organizations is different from traditional corporate firms. Unlike traditional firms that incorporate a top-

down hierarchal structure, worker-owned cooperatives allow each employee–owner to be or serve in some shared leadership capacity, serving on the board or other shared managerial capacities.

High turnover is still a concern for worker-owned cooperatives. Both founding and nonfounding members of worker-owned cooperatives risk an adverse propensity to organizational commitment in the form of burnout. Even though I did not reflect much on burnout in the study, participants did briefly express the possibility of burnout occurring, leading to increased turnover. Burnout harms organizations and employees' overall health and well-being (Cropanzano et al., 2003). In addition, burnout can cause discontent with employee–owners and an individual's lack of identification with the organization, which leads to the intention of leaving the organization (Park, 2018).

One phenomenon in the interview response of a participant was founder's burnout. The participant explained *founder's burnout* as when a founding member of a worker-owned cooperative has reached a point of mental and emotional exhaustion to the point of leaving the cooperative. Even though worker-owned cooperatives provide employee–owners the resources of autonomy and decision making (Gupta, 2014; Park, 2018), owners can still experience the mental and emotional toll associated with ownership and decide to leave the cooperative.

Furthermore, the study's findings confirm the literature review regarding P–O fit and value congruence theories. However, conceptual framework sources remain limited regarding mismatches between organizations and employee–owners within the worker-owned cooperative sector. Therefore, in this study, I focused on exploring any

mismatches between the organization and individuals who work for worker-owned cooperatives and the perceptions of organizational value. Cooperative employee–owners view value and commitment as essential antecedents to successful cooperatives and happy workers.

Overarching Research Question and Findings

The overarching focus of the study explored if there are mismatches between the organization and the employee–owner in relation to organizational value. In this study, I concentrated on understanding the meaning of value in a worker-owned cooperative. This study did not elicit any definite mismatches between the organization and the employee–owners concerning organizational value based on the overarching research question. The findings identified five themes consistent with the literature regarding value congruence, P–O fit, and worker-owned cooperatives. Collective entrepreneurship, participative decision making, support, patronage, and value are practical tools for ensuring a cooperative's success. The research findings did not illustrate one specified way for worker cooperatives to achieve any or all of the identified themes. Cooperative organizations can create a pathway-specific industry, regional location, and community that best fits their needs.

Limitations of the Study

I was able to execute the study according to Chapter 1. The strategies that I identified to complete this study utilized I ensured that participants had the necessary resources to participate. I was able to interview all 15 study participants despite the unforeseen challenges that arose due to COVID-19.

In Chapter 1, I suggested that the transferability of the results is a limitation of the study. I did not account for interviewing participants from multiple industries within the cooperative sector. This study can transfer to other industries; however, the population sample is specific to worker-owned cooperative, which may not allow the results from this study to transfer to traditional corporate organizations.

As stated in Chapter 1, I used purposeful sampling to gather rich information from the participants. I was able to learn about participant's perceptions and experiences working in a cooperative organization. I was also able to learn about the participant's understanding regarding organizational value, affective member commitment, and organizational fit. The USFWC membership directory assisted in identifying participants that fit study criteria and who best answered the research question.

Also, I mentioned in Chapter 1 that using computer communication software to conduct the virtual semistructured interviews may be uncomfortable for some participants which can be a limitation of the study. However, all 15 participants were proficient with video conferencing and computer communication software, and I did not need to supply any participant with instructions on how to download the software. Additionally, all 15 study participants willingly shared their perceptions and experiences in the interviews. Furthermore, I employed member checking as a data collection approach and asked participants for any additional comments and input regarding their interview.

Recommendations

In this study, I focused on exploring the mismatch between the organization and the individual who works for a worker-owned cooperative in relation to organizational

value. In this exploration, I concentrated on concepts involving value congruence and fit theory. Worker-owned cooperatives provide workers an alternative to entrepreneurship by allowing individuals to collectively joined together to own, run, manage, and operate a business (Webb & Cheney, 2014). However, motivation for joining a worker-owned cooperative may differ, and recent research suggests that some individuals join worker cooperatives as a response to crisis or distress (Vieta et al., 2016).

I propose that more research should explore motivation attributes of individuals joining a worker-owned cooperative to advance the understanding of intrinsic and extrinsic factors influencing an individual's decision to join a cooperative. Although this study did not focus on motivation factors, I recommend expanding this study to include motivation as an antecedent to organizational fit. I also recommend that future research incorporate a mixed methodology study to address any quantitative aspects of worker-owned cooperative statistics.

The participants of this study represented both founding and nonfounding members of worker-owned cooperatives. Therefore, this study did not focus on whether a participant was a founding member or not. However, I recommend that future research expand on this study's premise by exploring the mismatch between founding members and non-founding members of worker-owned cooperatives concerning organizational value. Founding members are fully or partially involved in the creation or founding of the cooperative (Lampinen et al., 2018).

With founding members, future research can also explore the influence of power founding members on nonfounding members and how this dynamic relates to

participatory decision making within the cooperative. In this study, 7 out of the 15 participants were founding members. Another topic worth exploring in future research is the difference between these two subgroups concerning emotional and psychological ownership and organizational effectiveness.

One major factor that I identified in this study is the lack of diversity within the worker cooperative sector. This study had no representation from Black-owned worker cooperatives. A recommendation for future research would be to reproduce my research study design with a broader study population. My research study included a population with little racial diversity. Expanding the study to other ethnic groups within the cooperative sector would provide cooperatives practitioners an opportunity to include the perceptions and experiences of this demographic in future works.

Strengths and Weakness of the Current Study

I explored the general problem that worker-owned cooperatives face management's inability to engage with employee-owners to strengthen member commitment ultimately. I identified in the study that the participants from both data sets representing employee-owners and managerial personnel had similar perspectives and experiences to employee-owner member commitment. In addition, the study results showed that all 15 study participants shared similar processes with hiring new employee-owners and procedures to follow for resignation.

Due to the organizational structure of worker-owned cooperatives, I learned that majority of employee-owners are in managerial or leadership positions, and there is little differentiation between employee and leadership. Therefore, I selected the first three

participants who specifically identified leadership within their cooperative organization for the second data set. Based on participant interview responses, reflective journaling notes, document and archival material review, and member checking, I identified affective member commitment as an antecedent of organizational value within successful worker-owned cooperatives. Furthermore, based on the themes derived from data analysis, I identified member commitment and organizational value as indications of both P-O fit and value congruence.

The strength of the research study included using a qualitative case study approach to understand the meaning of P–O fit and value congruence and its impact on member commitment of employee-owners of worker-owned cooperatives. This study intended to explore the mismatches between the organization and the employee-owner to organizational value and any effect on member commitment. Based on themes derived from the data analysis in conjunction with data saturation and triangulation, I identified that member commitment represents elements of value an employee-owners has to their cooperative organization.

A weakness of the current study is that I did not include a broader selection of participants, including more women and people of color. As mentioned above, future research can expand of the premise of this study by incorporating both demographics. Another weakness of this study is that I did not include direct observations as a data collection method. Direct observation is a commonly used strategy in qualitative research to document participant's physical aspects and behaviors that may not be apparent through participant verbal responses to interview questions (Queirós, Faria, & Almeida,

2017). By using direct observations in future research, this approach may provide opportunities to explore and examine employee-owners in real organizational situations in real-time.

Implications

Implications to Practice

The empirical literature on worker-owned cooperatives has shown cooperative organizations as homogenous (Basterretxea et al., 2019). However, literature on the characteristics of the people involved in employee-ownership of worker cooperatives is limited (Basterretxea et al., 2019). This study brought forward different perspectives and experiences of employee-owners of worker cooperatives in the United States. Additionally, the study results produce themes and patterns that showed evidence that P–O fit and value congruence impact organizational value and member commitment.

The study results should not be the final determinant of whether an individual is the best fit for a collaborative, entrepreneurial work environment, a specific position within a worker cooperative, or understanding a potential employee-owners readiness to work for a cooperative. However, the results can assist in future purposeful recruitment by worker cooperative professionals to best match individuals to positions within worker-owned cooperatives. Purposeful recruitment practices can also include worker cooperatives developing a mission statement embedded into the organization's identity. Therefore, incoming employee-owners know the expectations of the cooperative's overall goals and contribute to helping the organization reach goals and maintain a high-quality standard of service.

Once new ideal candidates for membership are selected, existing cooperative members and leaders of the cooperative to engage the new member in a participatory decision-making process to feel like a contributing member to the company. Also, allowing new members to be involved in decision-making processes early in the cooperative career can reduce social loafing in the workplace.

Worker cooperative business models have shown throughout the years to be resilient when crises arise. For example, during the global pandemic (COVID-19), cooperative businesses have to ensure that their enterprises can sustain themeselves in the aftermath of the current crisis (Dave, 2021). The advantage that organizations such as worker-owned cooperatives have during this time of economic uncertainty is the expectation of higher quality and quantity of effort inputs, higher retention rates, savvier management practices, and better incentives for technical, organizational, and social change (Altman, 2015). The results from this study can help worker co-op members, and cooperative practitioners, reimagine the concept of member commitment in times of crises.

Implications to Theory

Researchers and scholar-practitioners who are currently developing or desire to develop interventions or expand on the existing body of knowledge on worker-owned cooperatives may find this research study valuable. Finally, cooperative professionals may find this research offers insight into the importance of including matching criteria for hiring purposes and potential employee-owners who show the desired attitudes and behaviors consistent with member commitment to a worker cooperative organization.

Additionally, value congruence between the organization and the employee-owner reflects of how the individual identifies with the cooperative (Gonzalez & Chakraborty, 2012).

This study explored the mismatch between the organization and the individual who works for a worker-owned cooperative in relation to organizational value. This study brought forth themes related to organizational fit, value congruence, and member commitment which adds to the existing body of literature. The five themes shed light on the individual and organizational perspectives of cooperative workers. They can be used to move beyond this study scope to explore other relative matters concerning cooperative enterprises.

Implications to Social Change

Worker-owned cooperatives are not a new concept to ownership but provide individuals an alternative to entrepreneurship. Cooperative enterprises provide their members a platform for multistakeholder participation from workers, producers, and consumers (Ridley-Duff & Bull, 2019). The significance of this study is rooted in the history of why worker-owned cooperative organizations have explicitly evolved in the United States and the conceptual frameworks that shaped the study. The foundation of the cooperative movement begins with the Rochdale Pioneers. Throughout the years to the current day, cooperative organizations have displayed resiliency in protecting the livelihood of their members (Francesconi et al., 2021).

The worker-cooperative sector provides more than employment to its members. Different points of view within managerial literature still debate the effectiveness of the

cooperative movement, cooperation, and profit-sharing (Fusco & Migliaccio, 2018). However, the participants in the study offered consistency regarding to the culture and nature of cooperative organizations. This research study illustrated participants' perspective that many of the worker-owned cooperative started to collectively combine resources including skills, to create employment for themselves and others who might share the vision. The literature in this study supports the evolution of these types of alternative business structures.

Conclusion

Worker cooperatives in many communities are a responsible, more reasonable stake-holder oriented workplace (Ranis, 2019). With the increase in scholarly literature and research in the cooperative sector, specifically worker-owned cooperatives, the importance of including member commitment as an antecedent to sustain cooperative organizations in cooperative literature is essential (Yang et al., 2017). Literature also reflects that cooperative organizations are resilient in the time of crisis (Singh et al., 2019). Despite the lower numbers of cooperative organizations in the United States versus other regions, worker-owned cooperatives represent their workers as actual economic contributors while providing an alternative to corporate shareholder firms (Ranis, 2019).

In identifying five specific themes that relate to the conceptual frameworks of P-O fit and value congruence theory, I achieved the purpose of the study. This study aimed to explore the mismatch between the organization and the individual who works for a worker cooperative in relation to organizational value. I recruited 15 individuals that are

employee-owners of multiple worker-owned cooperatives in the United States. These individuals participated in virtual semistructured one-on-one interviews that explored the perspectives and experiences as employee-owners in a worker-owned cooperative and the importance of member commitment to their organization.

All 15 study participants' interview responses were similar, and I was able to achieve data saturation. Through interview responses, reflective journaling, document review, and archival material, the results suggested that employee-owners and managerial personnel should match the organization's vision. Additionally, the results suggested that individuals should be willing and able to engage in attitudes and behaviors consistent with cooperative organizational practices. For example, in the hiring process of new employee-owners, current cooperative members are encouraged to sponsor newer or potential employee-owners to provide mentorship, support, and resources to prepare an employee-owner for collective ownership.

Comments from participants showed that participants perceived the importance of organizational fit to be a factor of high member commitment and reducing turnover. However, there were statements made that due to the specific industry of the worker cooperative, high turnover is a norm. Through the analysis of data, I identified five themes that emerged from the collection of data. These themes suggested that collective entrepreneurship, decision making, support, patronage, and value are factors in matching an individual with the worker cooperative organization values. Finally, understanding that each cooperative organization may be different in the industry, but at the core of the organization the people truly make the cooperative successful. Therefore, in following

the main cooperative principles set by the ICA and USFWC, cooperative organizations can genuinely be pillars in their respective industries, communities, and the cooperative movement at large.

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Appendix A: Expression of Interest Email to USFWC and CB2E

Doctoral Research Study
My name is Mary Anne Broner and I am a doctoral candidate at Walden University. My field of focus is in Management with a specialization in Leadership and Organizational Change. The reason I am writing you is to ask for assistance in identifying worker-owned cooperatives that are willing to participate in my research study. This research is supervised by Dr. Danielle Babb, who has a broad background in leadership, organizational behavior, organizational culture, and change management.

We would like to invite you to assist with this research study. The remainder of this email will provide information so that you can make an informed decision concerning your level of assistance.

What is the research about?
I am conducting a research study to explore the mismatch between the organization and the employee-owner who works in a worker-owned cooperative in relations to organizational value. Worker-owned cooperatives offer an alternative business model that supports self-employment opportunities to its members as well as contribute to social inclusion, collective entrepreneurship, and empowerment. Despite the positive factors research shows, one major factor that contributes to the decreasing number of worker-owners employed with worker-owned cooperatives in the United States is the lack of commitment from worker-owners.

What does participation in this research study involve?
Participation in this study will be limited to 15 individuals that are employee-members within multiple worker-owned cooperative located in the United States. The worker-owned cooperative organization will need to be established for at least three years. Should one of the worker-owned cooperative organizations provided from your database be included in the final selection, participation would involve participating in virtual individual interviews via Skype that explores their unique feelings and experiences of being a part of a worker-owned cooperative. Also, at least three of the 15 study participants must hold a management/leadership position within the cooperative.

The goal of the virtual interviews is that pre-selected interview questions will encourage a discussion in relations to their interpretations of the meaning of cooperative values as well as their individual relationship with any or all organizational changes including intention to leave the cooperative that have occurred over time.

A separate email will be sent to each identified cooperative organization outlining the research focus. Each cooperative organization will also have the opportunity to decline to participate.

Guarantee of confidentiality
Due to the nature of this internet-based study, confidentiality can not be completely guaranteed. None of the individual results will be made available to any of the organizations or parties that did not participate in this study. The results of the study may be used, at an aggregate level, in reports, presentations and publications. Individual participants will not be identified. Each interview will be audio recorded for the purpose of assisting the researcher to accurately report research findings.

Confirmation of participation
By replying to this email using the phrase "(your name here), agrees that Mary Anne Broner may contact worker-owned cooperative organizations from your database to see if they are interested in participating in this research", you are agreeing that you have read the above information. You are also saying that you understand the intent of this research and that you know what you are being asked to do. Please print or save a copy of this invitation for your records. By responding to this email with this phrase included, you are giving consent for me, Mary Anne Broner to contact worker-owned cooperatives from your database to identify those interested in participating in my research study.

Please respond to this email no later than (insert date here).

I am happy to respond to any questions or concerns you have about the research. I can be reached at 313-948-5852 or by email: maryanne.broner@waldenu.edu.

Appendix B: Expression of Interest Email to Cooperative Organization

Doctoral Research Study
My name is Mary Anne Broner and I am a doctoral candidate at Walden University. My field of focus is in Management with a specialization in Leadership and Organizational Change. The reason I am writing you is to invite your organization to participate in a research study. I obtained your information from (USFWC/CB2E). This research is supervised by Dr. Danielle Babb, who has a broad background in leadership, organizational behavior, organizational culture, and change management.

We would like to invite you to assist with this research study. The remainder of this email will provide information so that you can make an informed decision concerning your level of participation.

What is the research about?
I am conducting a research study to explore the mismatch between the organization and the employee-owner who works in a worker-owned cooperative in relations to organizational value. Worker-owned cooperatives offer an alternative business model that supports self-employment opportunities to its members as well as contribute to social inclusion, collective entrepreneurship, and empowerment. Despite the positive factors research shows that one major factor that contributes to the decreasing number of worker-owners employed with worker-owned cooperatives in the United States is the lack of commitment from worker-owners.

What does participation in this research study involve?
Participation in this study will be limited to 15 individuals that are employee-members within multiple worker-owned cooperatives in the United States. The worker-owned cooperative organizations will need to be established for at least three years. Should any of the employee-members from your organization be included in the final selection, participation would involve participating in virtual individual one on one interview via Skype with the researcher that explores their unique feelings and experiences of being a part of a worker-owned cooperative. Also, at least three of the 15 study participants must hold a management/leadership position within the cooperative. The researcher will ask 11 questions that are related to worker-owned cooperatives, organizational value, and member commitment.

The goal of the virtual one on one interviews is that pre-selected interview questions will encourage a discussion in relations to their interpretation of the meaning of cooperative values as well as their individual relationship with any or all organizational changes including intention to leave the cooperative that have occurred over time.

A separate invitation will be sent to each individual employee-member identified as potential study participants via email outlining the research focus. Each individual employee-member will also have the opportunity to decline to participate.

Guarantee of confidentiality
Due to the nature of this internet-based study, confidentiality can not be completely guaranteed. None of the individual results will be made available to any of the organizations or parties that did not participate in this study. The results of the study may be used, at an aggregate level, in reports, presentations and publications. Individual participants will not be identified. Each interview will be audio recorded for the purpose of assisting the researcher to accurately report research findings.

Confirmation of participation
By replying to this email using the phrase "(your name here), agrees that Mary Anne Broner may contact employee-members to see if they are interested in participating in this research", you are agreeing that you have read this information. You are also saying that you understand the intent of this research and that you know what you are being asked to do. Please print or save a copy of this invitation for your records. By responding to this email with this phrase included, you are giving consent for me, Mary Anne Broner to contact employee-owners from your cooperative to identify those interesting in participating in this research.

Please respond to this email no later than (insert date here).

I am happy to respond to any questions or concerns you have about the research. I can be reached at 313-948-5852 or at maryanne.broner@waldenu.edu.

Appendix C: Acknowledgement of Participation and Gratitude Letter

Dear (participant),

Thank you for your participation in my study: *Organizational Value: Exploring the Mismatch between the Organization and Employee-owners in a Worker-owned Cooperative*. Attached is a confidential transcript of the focus group interview I conducted on (date of interview). The purpose of the transcript is to provide verification of your responses as you intended to convey during the interview session. The transcript represents provisional data and interpretation of your responses, which I seek to ensure and capture your meanings as intended.

Please take a moment and review the transcript information to verify the accuracy of what I recorded during the interview. I invite you to offer additional comments for any clarification, questions, or further elaboration on your response information. Please return your comments or questions, if any, on or before 10 calendar days from this letter as the return date. Once again, thank you for your participation in my research study.

Best,

Mary Anne Broner

Appendix D: Skype Preparation Checklist

- Determine appropriateness of study or population for Skype interviewing.
- Decide whether to use audio or video.
- Brainstrom for possible distressing events (new ones may come up during the research:
    - Consider responses to these events and whether you will be able to respond sufficiently through Skype.
- Create a plan for how to manage these events, discussing with others where needed:
    - Supervision chair/committee members
    - IT/Tech support
    - Legal Team (if needed)
- Set up research Skype username and profile:
    - Make any personal accounts private
    - Make research account username easy to identify.
    - Decide if you want to include a photo in your profile.
- Create directions for how to set up Skype to provide to participants.
- Check that the microphone/camera on the device you are using for interviews is working and up to date (do regularly during the course of the research).
- Test Skype call from the interview location.

Appendix E: Directions for downloading Skype

- On your latest version of Windows or Mac, go to https://www.skype.com/en/get-skype/
- Select your device (Windows or Mac if using a desktop or laptop) or (Google Play or Apple Store if using a smartphone or tablet).
- Once downloaded to your preferred device, you can launch Skype.
- Launch Skype and select Create New Account (if you don't already have an existing account) page.
- Skype will automatically take you through the process of creating a new account.

If you already have Skype downloaded to your device:

- Open Skype and click or tap Skype name, email, or phone.
- Enter your Skype name, email, or phone and select Sign in.
- Enter your password and select the arrow to continue.
- You are now signed in to Skype.

Note: Once you've singed in, Skype will remember your sign in information when you close Skype or sign out and choose to remember your account settings on your selected device.

Appendix F: Employee-owner Interview Questions

The following questions will be discussed by study participants during the employee-owner one on one interviews:

Question 1. How would you describe your understanding of a worker-owned cooperative?

Question 2. Why did you decide to work for a worker-owned cooperative?

Question 3. How would you describe your understanding of organizational value?

Question 4. How would you describe affective member/organizational commitment?

Question 5. How would you describe the role and responsibilities of the managers and leadership in your organization?

Question 6. How would you describe the leadership style of the managers and leadership in your organization?

Question 7. How would you describe the organizational practices that influence organizational value?

Question 8. How would you describe the matching of cooperative values (i.e. self-help, self-responsibility, democracy, equality, equity, and solidarity) on the impact of organizational value?

Question 9. How would you describe the matching of organizational fit on the impact of organizational value?

Question 10. How would you describe the matching of leadership style from your managers and leaders as being different regarding organizational value? (For clarity: what is the significate difference of the manager/leaders leadership styles aligning with your organization's values?)

Question 11. What are the consequences for an individual when they decide to leave the worker-owned cooperative?

Appendix G: Management/Leadership Interview questions

The following questions will be discussed by study participants during the one on one semi structured interviews:

Question 1. How would you describe your understanding of a worker-owned cooperative?

Question 2. Why did you decide to work for a worker-owned cooperative?

Question 3. How would you describe your understanding of organizational value?

Question 4. How would you describe affective member/organizational commitment?

Question 5. How would you describe the role and responsibilities of the employee-owners in your organization?

Question 6. How would you describe your leadership style?

Question 7. How would you describe the organizational practices that influence organizational value?

Question 8. How would you describe the matching of cooperative values (i.e. self-help, self-responsibility, democracy, equality, equity, and solidarity) on the impact of organizational value?

Question 9. How would you describe the matching of organizational fit on the impact of organizational value?

Question 10. How would you describe the matching of your leadership style as being different regarding organizational value? (For clarity: what is the significate difference of your leadership styles aligning with your organization's values?)

Question 11. What are the consequences for an individual when they decide to leave the worker-owned cooperative?

Appendix H: Study Participant Demographic Questionnaire

1. What is your gender?
    a. Male
    b. Female
    c. Prefer not to answer

2. What is your age?
    a. 18-30 years old
    b. 30-45 years old
    c. 45+
    d. Prefer not to answer

3. Please specify your ethnicity
    a. Caucasian
    b. Black/African American
    c. Latino or Hispanic
    d. Asian
    e. Native American
    f. Native Hawaiian or Pacific Islander
    g. Two or more
    h. Other/Unknown
    i. Prefer not to answer

4. What region of the United States are you located?
    a. Northeast
    b. Southeast
    c. Midwest
    d. Southwest
    e. West

5. Years of employment with your cooperative
    a. 0-1 year
    b. 1-3 years
    c. 3-5 years
    d. 5+ years

6. If you are a manager or leader, how many years have you been in current position?
    a. 0-1 year
    b. 1-3 years
    c. 3-5 years
    d. 5+ years